Sidekick

User Guide

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Getting Started 6
If you have problems 6
System Requirements 6
Sidekick Requirements 6
Using Sidekick on a Network 6
Filemaker Licensing 7
Logging in for the first time 7
Conventions Used 9
General 9
Navigation within modules 10
Terminology 10
User Passwords 11

HOME 12
Quick Work Entry 12
Review Work Entries 13
Unpaid Invoices 14
Payments 14

CONTACTS 16
About Contacts and People 16
Create a new Contact 17
People 18
Create a new Person 19
Change Person details 20
Addresses 20
Create a new address 21
Change address details 21
Activity 22
Jobs 22
Invoices 22
Documents & Notes 23
Documents 23
Create a new document 23
Notes 24
Create a new note 25
Edit Profile 25

JOBS 26
About Jobs 26
Summary 27
Overview 27
Add a job item 27
Create a new item from a job 28
Change a job item 29
Financial Summary 31
Calculations explained 31
Work Summary 32
Calculations explained 32
People 33
Add a person to the job 33
Add staff to the job 34

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Activity....36
Time....*36*
Create a new time entry....36
Change a time entry....38
Expenses....*38*
Create a new expense....38
Change an expense....39
Invoices....*39*
Create a new invoice....39
Change an invoice....40
Print or PDF an Invoice....41
Documents & Notes....43
Documents....*43*
Create a new document....43
Notes....*43*
Create a new note....44
Key Facts....*45*
Edit Profile....46

SERVICES....47
About Services and Templates....47
Services....48
Add a new service item....*48*
Templates....49
Create a new template....*49*
Add a service item to a template....*50*

REPORTS....51

SETTINGS....52
Users....52
Create a new user....*52*
Change a user....*53*
General....54
Naming conventions....*54*
Country settings....*54*
Numbering....*55*
Invoices....55
Invoice preferences....*56*
Payment terms....*56*
Letterhead....57
Edit Profile....58

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List of screenshots / images

Figure 1 – Log in screen 7
Figure 2 - Edit item in list 9
Figure 3 - Navigation dots 9
Figure 4 - Main section links 10
Figure 5 - Quick Menu links 10
Figure 6– Quick Work Entry 12
Figure 7 – Action icon (Review Work Entries) 13
Figure 8 – Settings (Review Work Entries) 13
Figure 9 - Unpaid Invoices 14
Figure 10 – Action icon (Unpaid Invoices) 14
Figure 11 - Pay an Invoice 15
Figure 12 - Data Model (Contacts and People) 16
Figure 13 - Add New Contact 17
Figure 14 - Edit Profile (Contact) - Next 17
Figure 15 - Edit Profile (Contact) – Save 18
Figure 16 - Contact Header 18
Figure 17 - New Person 19
Figure 18 – Change Person details 20
Figure 19 - New Address 21
Figure 20 – Change Address details 21
Figure 21 - Job Filter 22
Figure 22 - Link to Job (Job List) 22
Figure 23 - Invoice Filter 22
Figure 24 - Link to Job (Invoice list) 23
Figure 25 - Documents (Contact) 24
Figure 26 - Notes (Contact) 24
Figure 27 - New Note (Contact) 25
Figure 28 - Job screen layout 26
Figure 29 - New job item 28
Figure 30 - New service item (Job) 29
Figure 31 - Edit job item 30
Figure 32 - Job item over budget (Job) 30
Figure 33 - Job item over budget (Dashboard) 30
Figure 34 - Financial summary 31
Figure 35 - Work summary 32
Figure 36 - Add person to job 33
Figure 37 - Set Role 34
Figure 38 - Add Staff to job 35
Figure 39 - Set role and charge rate 35
Figure 40 - Activity summaries 36
Figure 41 - Time filter 36
Figure 42 - Job actions 37
Figure 43 - New time entry (Job) 37
Figure 44 - Edit time entry 38
Figure 45 - New invoice 39
Figure 46 - New invoice 40
Figure 47 – Change / finalise invoice 41
Figure 48 - Print invoice 42
Figure 49 - Documents (Job) 43
Figure 50 - Notes (Job) 44
Figure 51 - New Note (Job) 44
Figure 52 - Key Facts (Job) 45
Figure 53 - New Key Fact 46
Figure 54 - New service item 48

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Figure 55 - Edit Profile (Service Item) **49**
Figure 56 - New template name **50**
Figure 57 - Add service item to template **50**
Figure 58 - Create new user **53**
Figure 59 - Change a user **54**
Figure 60 - Country settings **55**
Figure 61 - Numbering **55**
Figure 62 - Invoice preferences **56**
Figure 63 - Payment Terms **57**
Figure 64 - Print Settings **57**
Figure 65 - Company details **58**
Figure 66 - Contact and licensing **58**
Figure 67 - Global settings screen **59**

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Getting Started

If you have problems

Before you begin, we are happy to help with any problems you may encounter so please don't struggle on your own!

Send us an email and we will do our best to resolve any issues you might have with Sidekick and/or Filemaker.

support@sidekickworks.co.uk

System Requirements

WINDOWS	MAC
Windows 7 on Intel computer Windows 8, Windows 8.1	Mac OS X 10.5.7 or higher (Leopard)
CPU**: Intel Pentium 4 / AMD Athlon 64 or newer** RAM**: 2 GB**	**CPU**: Intel-based Mac **RAM**: 4 GB

Sidekick Requirements

If you have purchased **Sidekick Solo**, you can install the software on your computer. This is a stand-alone application and does not require anything else to run.

If you have purchased **Sidekick Workgroup**, the software requires Filemaker Pro version 13, or later, to be installed on your computer.

Using Sidekick on a Network

If you have more than 1 user and you all need to access Sidekick from different machines, you will need to share the software over your network.

Sidekick Workgroup can be shared over a network in the following scenarios:

Up to nine (9) concurrent users can share database files (Sidekick) using Filemaker Pro. After that you will need to purchase Filemaker Server.

Please review the support documentation on the Filemaker website for more information about networking with Filemaker.

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http://help.filemaker.com/app/answers/detail/a_id/6095/~/introduction-to-sharing-files-with-filemaker-pro

Filemaker Licensing

To purchase Filemaker Pro (or Server) licenses, we are a reseller so please contact us. Alternatively, you can purchase directly from the Filemaker Store on the Filemaker website (http://www.filemaker.com)

Logging in for the first time

When you download the TRIAL version or when you have received your copy of Sidekick after purchase, you will see the following log in screen when you first launch the application.

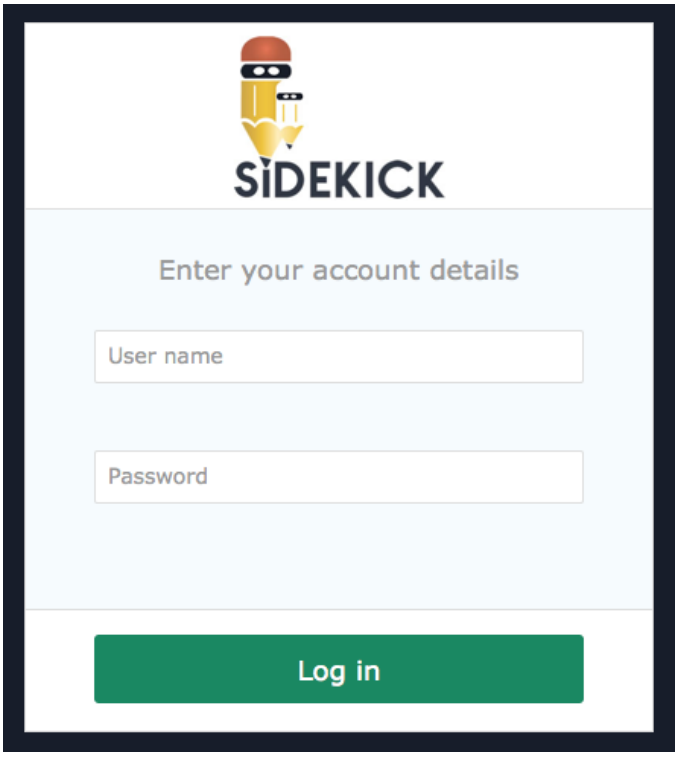

Figure 1 – Log in screen

Log in for the first time using the following details:

User name = **admin**
Password = **admin**

Please note this should be entered exactly as shown above.

When you log in for the first time, we strongly suggest you go straight to SETTINGS and personalise your copy of Sidekick with your company details.

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If you have a license code, enter that in so you will be able to create the number of users you have paid for.

Create your users and set passwords.

See (Create a new user) for more information

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Conventions Used

General

- **Single-click** operations are used throughout Sidekick.
  Please note that double-clicking on menu options, buttons or tabs might have unintended results.

- TAB or ENTER keys will move the cursor to the next field. Exceptions to this are multi-line fields (eg. Notes) where you might want to have carriage returns.

- If there is no obvious "Save" button, clicking out of an edited field will save the record automatically.

- To edit information presented in lists or tables.
  Simply click on the row and a popup box will appear (Figure 2).
  Make your changes and click out of the changed field to save.

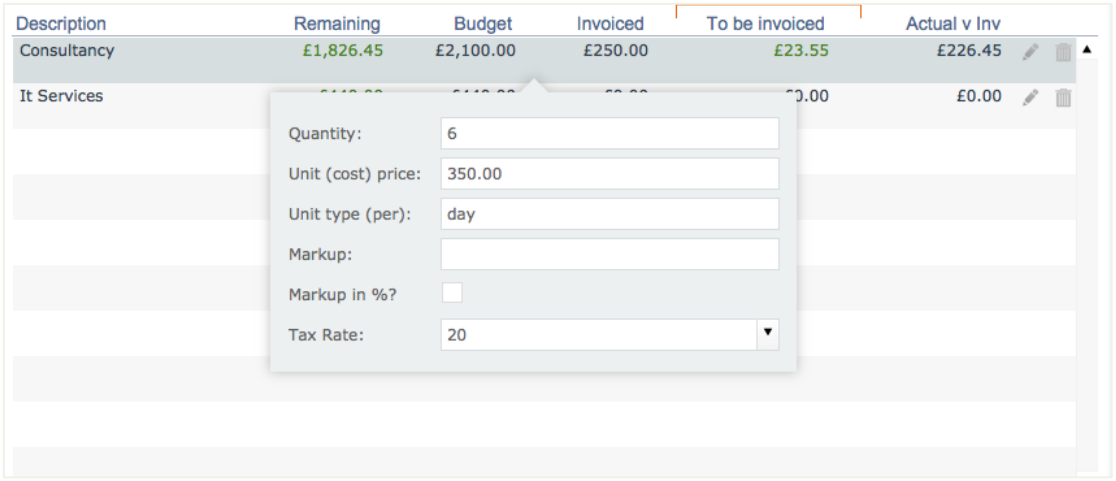

Figure 2 - Edit item in list

- Some sections have more than one sub-section or panel. You can link directly to these using the *Quick Menu* (see the next section).
- Alternatively, use the navigation dots at the bottom of the panel. (If you are using a touch device, you can use swipe gestures to navigate these panels).

Figure 3 - Navigation dots

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Navigation within modules

Every module has the same basic layout:

1) Main section links (Figure 4).
2) Quick Menu (Figure 5).

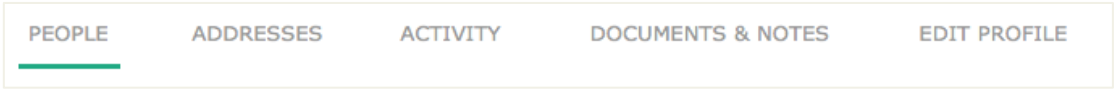

Figure 4 - Main section links

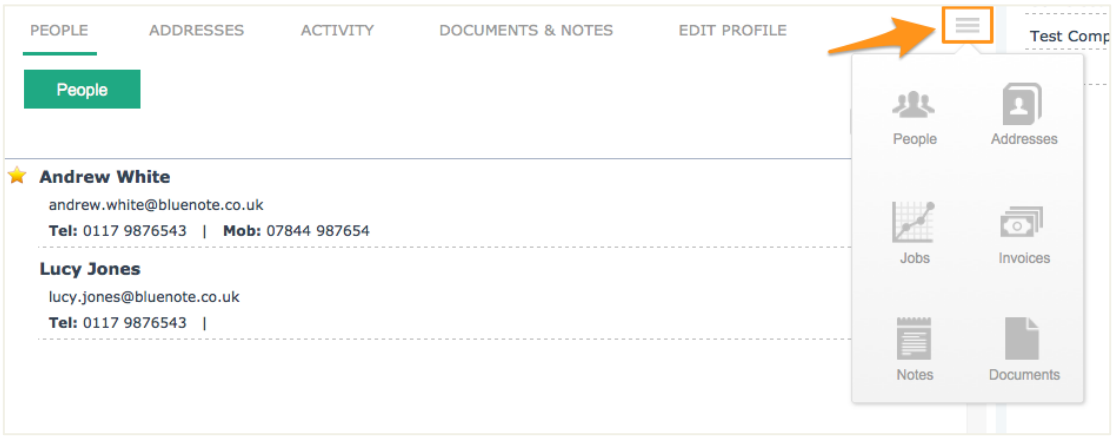

Figure 5 - Quick Menu links

Some of the main sections have more than one sub-section, so the *Quick Menu* allows you to jump quickly to the sub-section.

Terminology

You can set the naming conventions in Sidekick to match the terminology you use in your own business.

If you call your customers, “Clients”, then you can set Sidekick to call them Clients too.
If you call your jobs, “Projects”, then you can set Sidekick to call them Projects.

See (Naming conventions) for more information.

For the purposes of this Guide we will refer to these, as they are set when shipped:

- Contacts

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- Jobs
- Services

Term used	What it means
Costs	*Time / Expenses on a Job*
Work	*Time / Expenses on a Job*
Chargeable	*Time / Expenses to be invoiced, or charged back to the customer.*
Non-chargeable	*Time / Expenses to be included in overall costs on a Job, but these will not be picked up for invoicing.*
Written off	*Time / Expenses that were chargeable but for some reason were not able to be charged back to the customer. These are costs that **should** have been billed. If they can't be billed, they are written off rather than being marked as non-chargeable.*
Item	*This is a service / product or anything else you sell. On a Job, this is called a Job Item. In the SERVICES module it's an item or Service or Product (according to what you have called it in SETTINGS).*
Template	*This is a group of items that are added to a Job together. Could be an assembly, or a set of product items that need to be included to complete the Job. It could be activities that comprise a workflow. It's just an easy way of adding multiple items to a job – and ensuring that you don't forget things that might need to be sold together.*

User Passwords

Your users can change their own passwords in Sidekick.

This can be done from any screen in the system by clicking on the Profile icon in the top right hand corner of all the screens

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HOME

The Sidekick Dashboard presents a quick overview of your important data.

Quick Work Entry

Use the *Quick Work Entry* block to quickly enter Time or Expenses against your Jobs.

Work entered this way is automatically allocated to the logged in user and lists the Jobs that user has been assigned to

Select the entry type to begin (Figure 6)

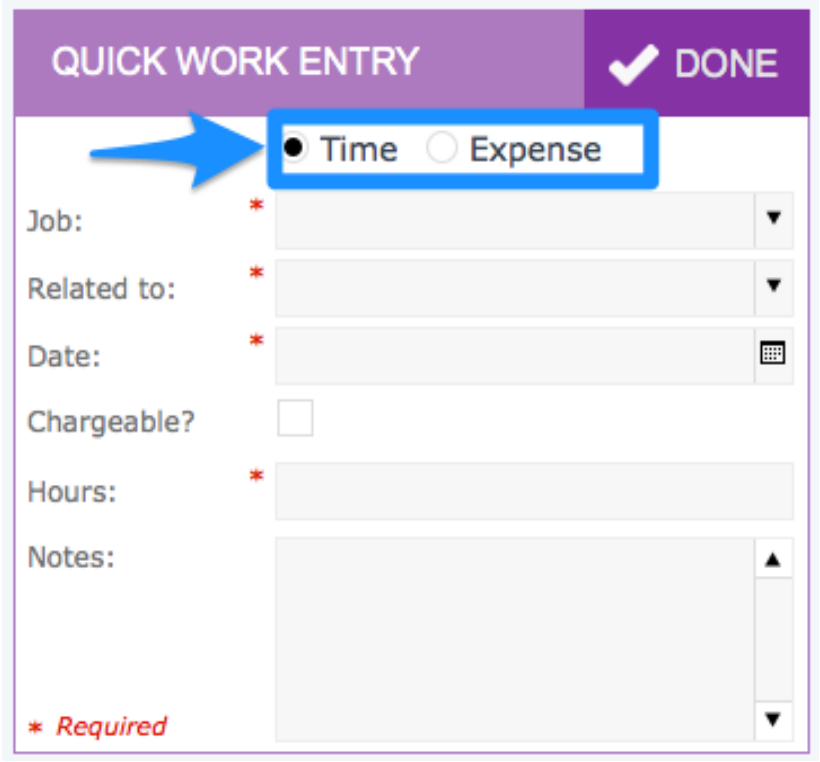

Figure 6– Quick Work Entry

Chargeable? - Use this field if you wish the Time / Expense to be picked up on the next invoice for your client.

Ensure all required fields are entered.

Click

when complete.

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Review Work Entries

Used for viewing Time entries in the system.

This goes across all Jobs and users, and shows totals of the selected data at the top.

Filter the list as follows:

1) Click on the Action icon on the *Review Work Entries (Time)* block header (Figure 7).
2) Set criteria (Figure 8)
3) Click

to view your selection.

Figure 7 – Action icon (Review Work Entries)

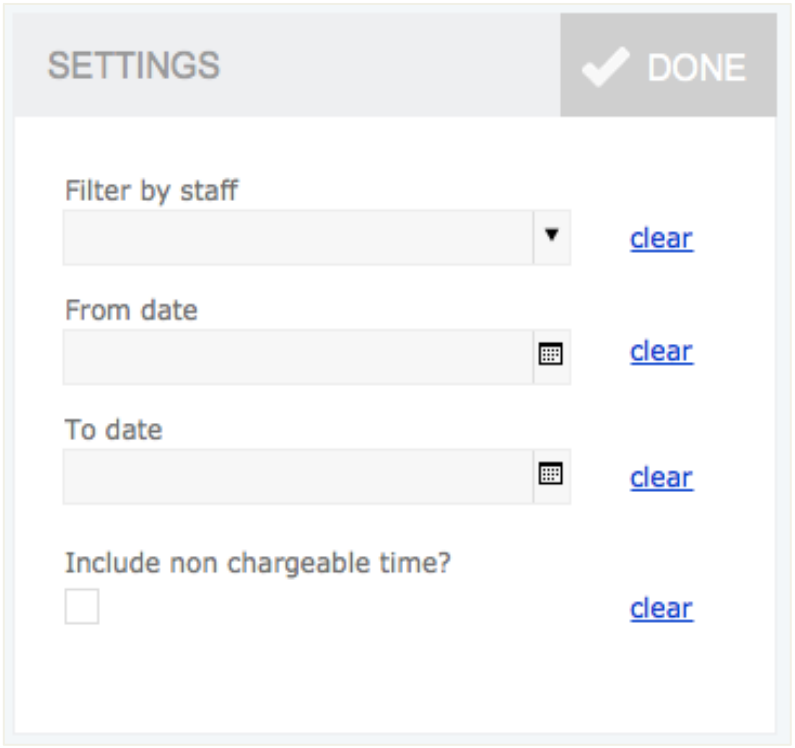

Figure 8 – Settings (Review Work Entries)

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Unpaid Invoices

Shows a list of outstanding invoices.

Once the invoice has been "Issued" (ie an Invoice date has been set) the number of days outstanding will start to calculate (see number outlined in orange below).

When the invoice goes beyond the Terms set in the Contact record, this number will display as RED.

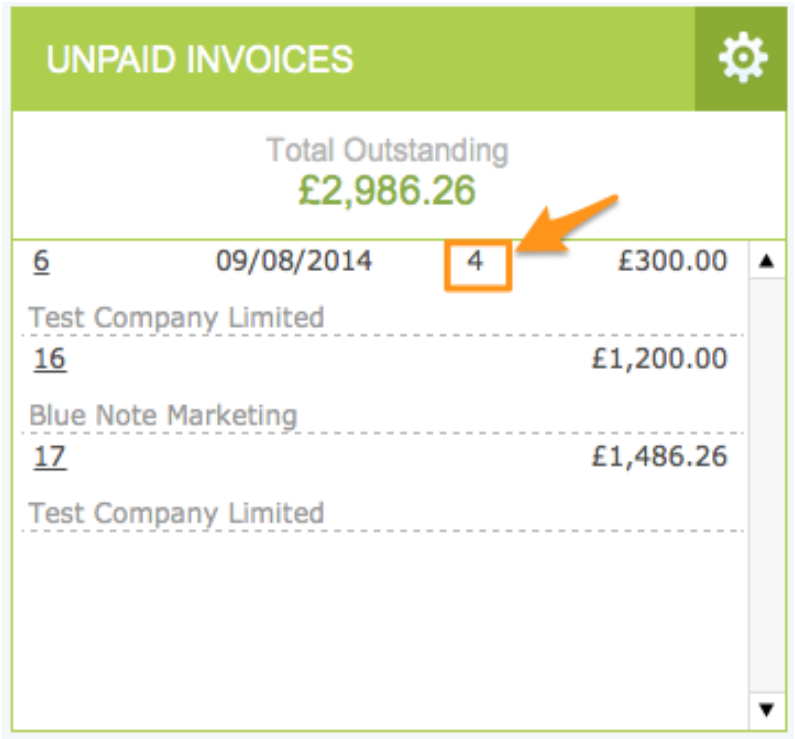

Figure 9 - Unpaid Invoices

Payments

1) To record a payment against an invoice, click the Action icon on the *Unpaid Invoices* block header (Figure 10).

Figure 10 – Action icon (Unpaid Invoices)

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2) This will display an entry box where you can select the invoice the payment relates to, and enter all the relevant details of the payment. (Figure 11)
   Ensure all the required fields are entered.
3) Click

when complete.

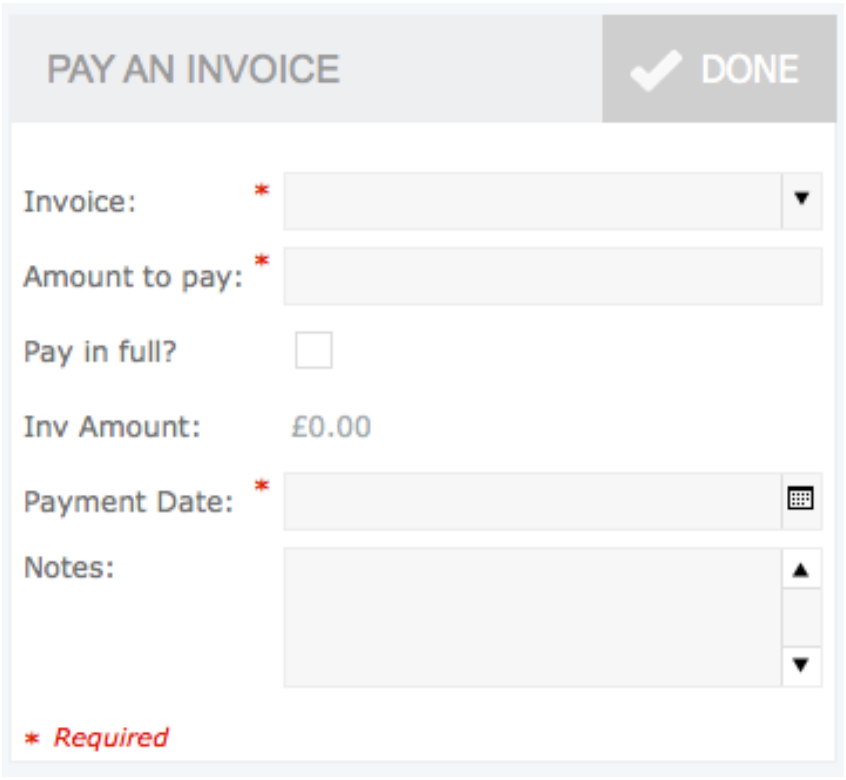

Figure 11 - Pay an Invoice

If you decide you do not wish to record a payment at this time, simply leave fields blank and click “Done”.

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CONTACTS

About Contacts and People

The Contact record contains the main Company information for your customer. The people you deal with at that company (or who are associated with that company) are created as related People records.

If your customer is an individual, or perhaps a Mr and Mrs Jones, then create the main Contact record but enter all the contact information (email, phone, mobile etc) as People records.

This will give you visibility of that information from your Job(s).

The model diagram explains the data relationships (Figure 12).

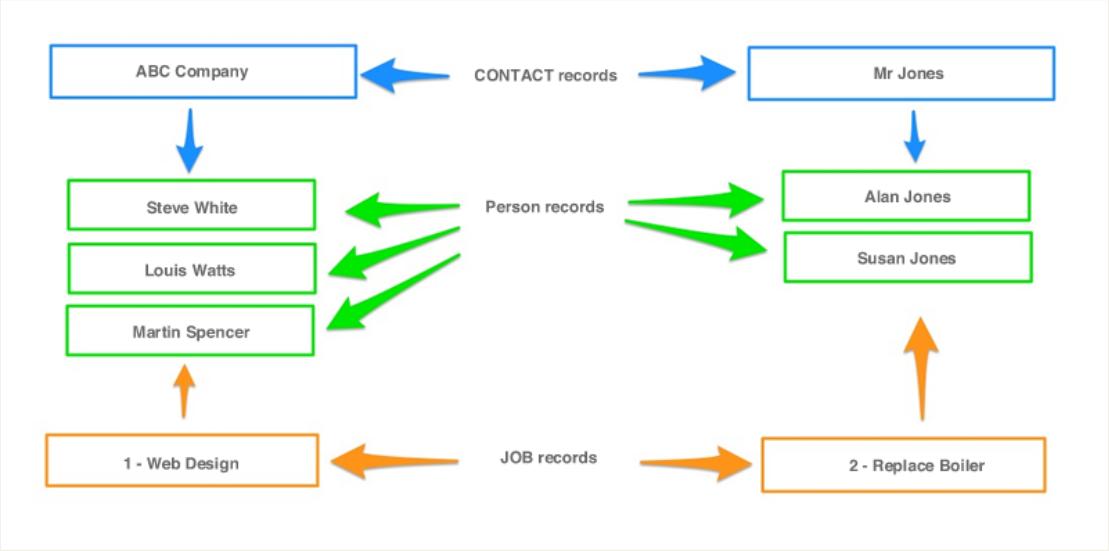

Figure 12 - Data Model (Contacts and People)

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Create a new Contact

1) Click the New Contact button in the top right hand corner above the Contact list.
2) Enter the Company name or Contact name when prompted and click "Save" (Figure 13)

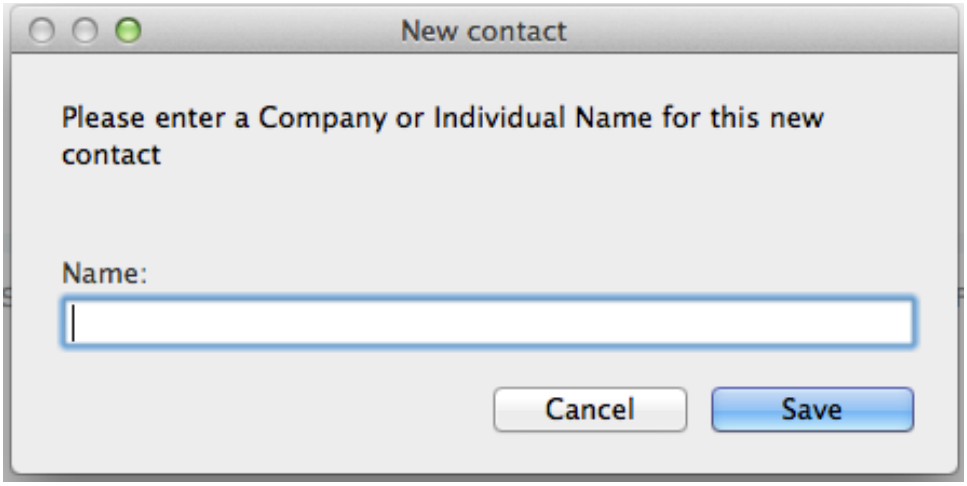

Figure 13 - Add New Contact

3) This will then display the **Edit Profile** section on the screen (Figure 14). If you change any information into the profile, you must click "Next" and then "Save" (Figure 14 & Figure 15) otherwise it will be lost.

   It is also possible to click away at this point and come back later.

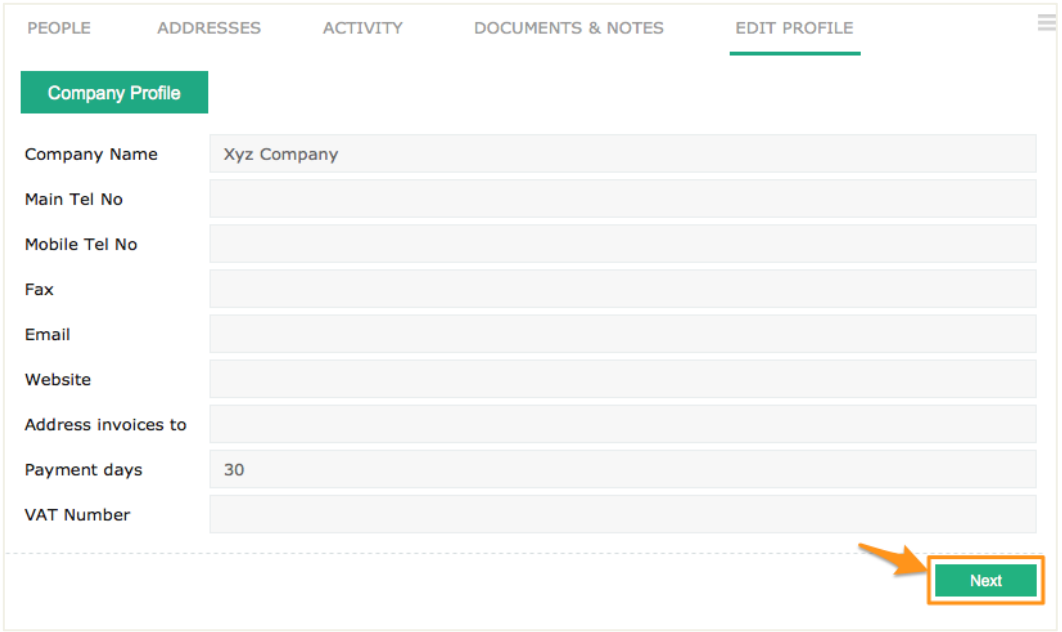

Figure 14 - Edit Profile (Contact) - Next

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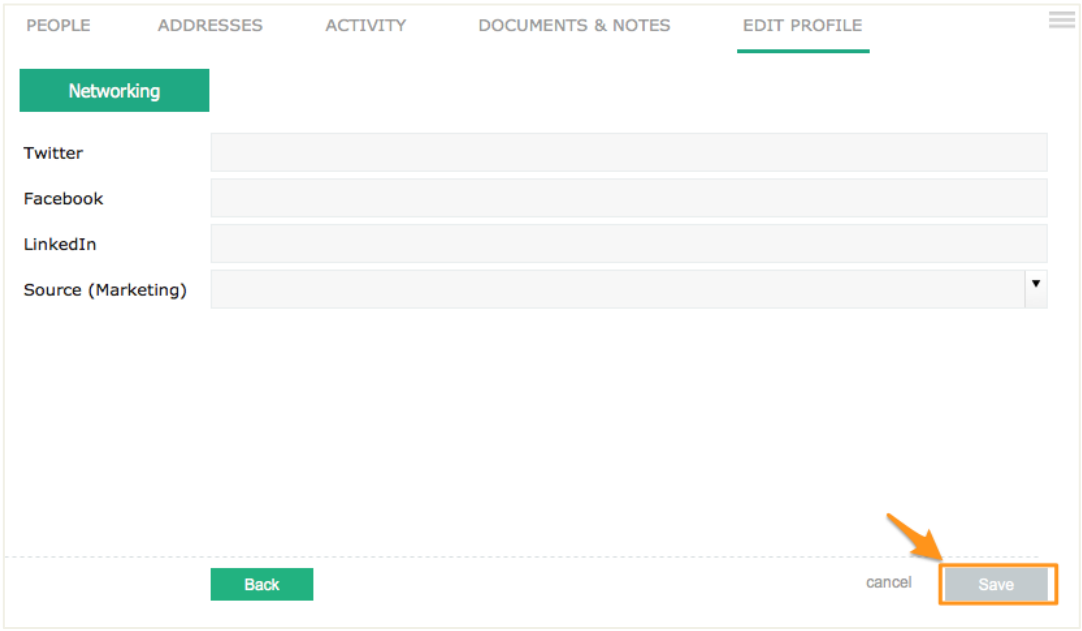

Figure 15 - Edit Profile (Contact) – Save

To view or change this information again, click the **Edit Profile** link.

Important contact details will be displayed in the *Header* block on the Contact record (Figure 16)

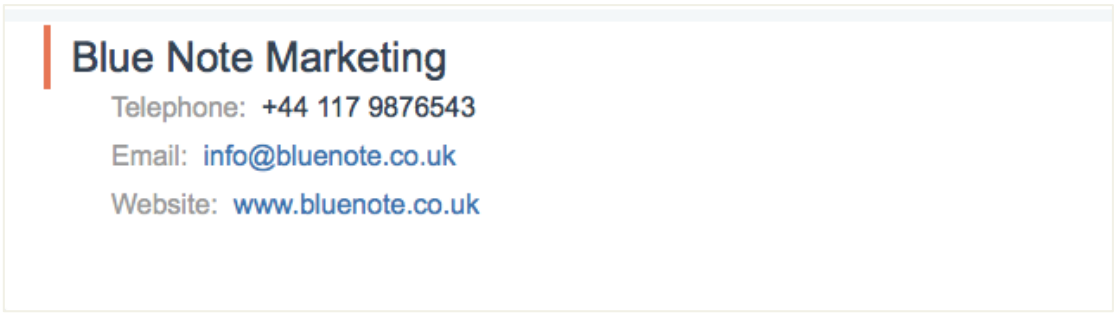

Figure 16 - Contact Header

- Click on the email address to create a new message.
- Click on the website address to launch the website in a browser window.

People

This section lists all the people associated with the Contact.

In addition to all the people directly related to the Contact, you can also enter other people who might work for another company but have something to do with that Contact.

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The advantage of doing this is that you can then add those people to your jobs.

Example:
You are doing a job for Company A. You might also consult with Joe Bloggs from Company P because he has some involvement with the work you are doing for your customer.

If you enter Joe Bloggs against the Contact record for Company A, then you can also access his details from the job you are doing for that customer.

In addition to that, you might consult with Joe on another job, for another customer, so you can add him to that job as well because his details have been captured in the database.

Create a new Person

1) Click the **People** link to go to the correct section, or select "People" from the *Quick Menu*.
2) Click the New Person button in the top right hand corner above the list.
3) The "New Person" window will open. (Figure 17).
   Ensure all required fields are entered.
4) Click "Save" to finish.

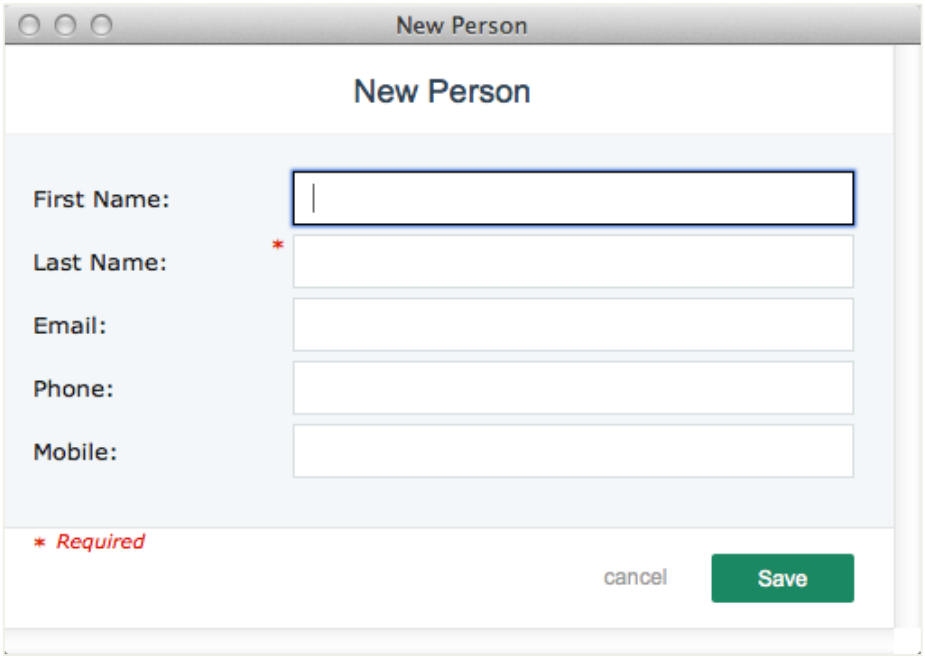

Figure 17 - New Person

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Change Person details

1) Click the **People** link to go to the correct section, or select "People" from the *Quick Menu*.
2) Click on the Person in the list.
   This will pop up a box with fields you can change. (Figure 18)
3) Click away when you are done.

NOTE: You will notice there is a field to set someone as a **Main contact**. This can be useful if you have many people in the list and you need to identify the person you are dealing with most.
A yellow star is displayed next to the default person in the list.

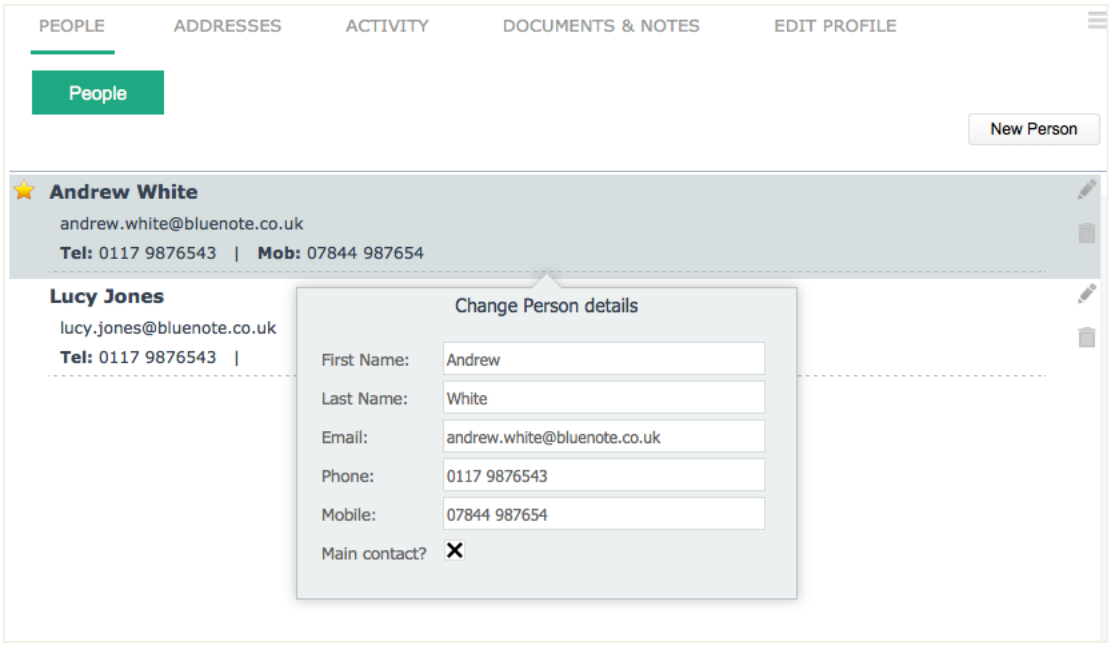

Figure 18 – Change Person details

Addresses

You can add multiple addresses against a Contact.

NOTE: It is important to set one address as the Default address, as this will be the address used on Invoices (Figure 20).
A yellow star displays next to the Default address in the list.

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Create a new address

1) Click the **Addresses** link to go to that section, or select "Addresses" from the *Quick Menu*.
2) Click the

button in the top right hand corner above the list.
3) The "New Address" window will open. (Figure 19)
4) Click "Save" to finish.

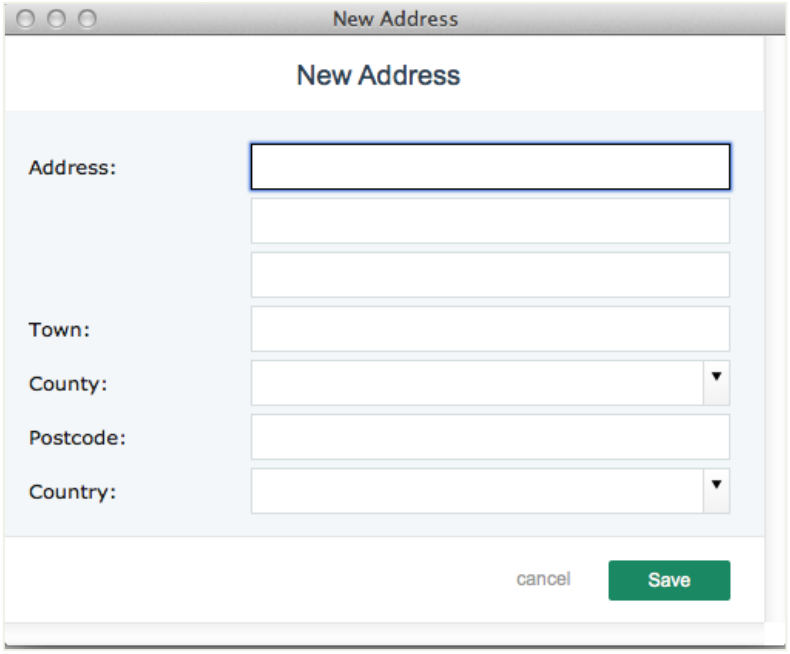

Figure 19 - New Address

Change address details

1) Click on the Address in the list. (Figure 20)
   This will pop up a box with fields you can change.
2) Ensure one address is set as the Default address
3) Click away when you are done.

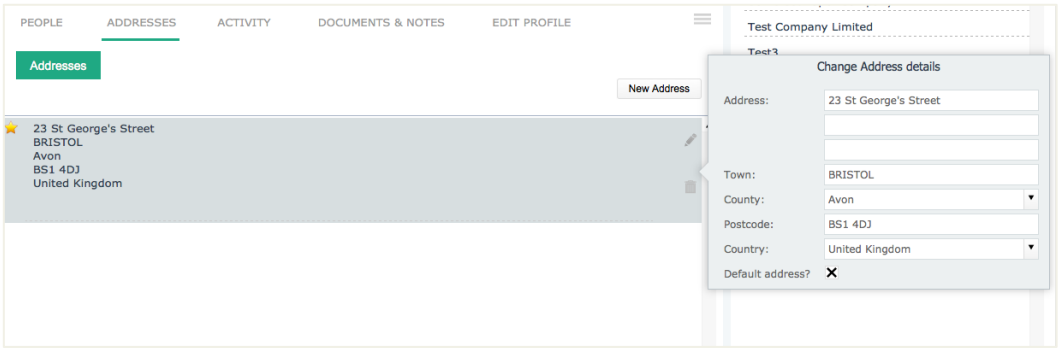

Figure 20 – Change Address details

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Activity

This section shows all the Jobs and Invoices for this particular Contact.

There is a summary of the *Active Jobs* (not completed yet) and *Unpaid Invoices* above both lists.

Click on either of those blocks to view the information in the sub-section below.

Jobs

This sub-section shows a list of all the jobs for this Contact.

Use the Filter to change the selection displayed in list.

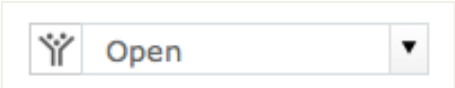

Figure 21 - Job Filter

Click on the Job Reference on any of the items in the list to view that job in the JOB module.

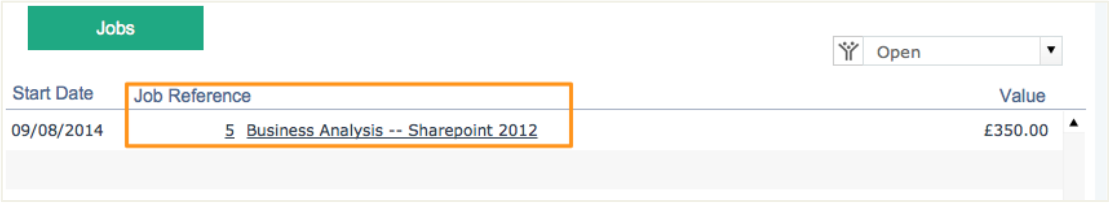

Figure 22 - Link to Job (Job List)

Invoices

This sub-section shows a list of all the Invoices for this Contact.

The total value of all invoices is displayed, as well as *Amounts Outstanding* and *Paid* across all jobs for that Contact.

Use the Filter to change the selection displayed in the list.

Figure 23 - Invoice Filter

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Click on the Job Reference on any of the items in the list to view that job in the JOB module.

Figure 24 - Link to Job (Invoice list)

Documents & Notes

This section can be used to manage communications with your customer.

This can either be in the form of notes you record in Sidekick, or documents produced outside in another application (eg: Word, Excel etc) and uploaded to Sidekick.

All members of your team can save files within Sidekick to allow for easy discovery and retrieval.

Documents

This sub-section can be used for storing documents.

Create a new document

1) Click the **Documents & Notes** link to go to the correct section. Alternatively, select "Documents" from the *Quick Menu*.
2) Drag your file into the upload zone in the **Documents** sub-section. Or click in the upload zone to browse for your file (Figure 25).
3) Click on the document in the list (not the thumbnail) to set a Category and a Description. Any of the text in these fields can be used to **Find** the document in the Search field above the list.
4) Click the thumbnail to launch the document in the original application.

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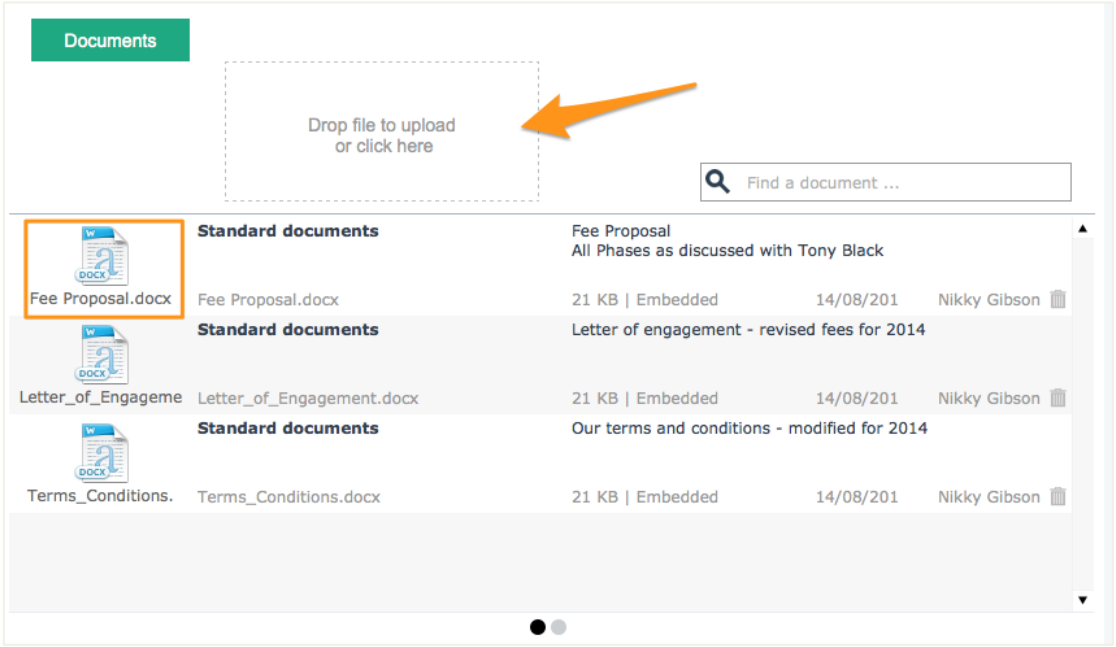

Figure 25 - Documents (Contact)

Notes

Use this sub-section to record incidental notes against the Contact. You might use this for tracking all your communications with a customer, or for recording reminders. This is especially useful as a historical record of events, or to share information with a team of people.

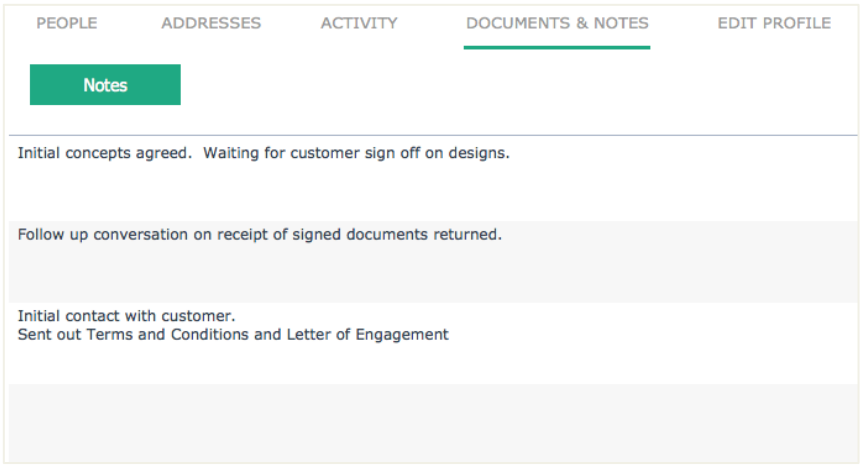
PEOPLE
ADDRESSES
ACTIVITY
DOCUMENTS & NOTES
EDIT PROFILE
Notes
Initial concepts agreed. Waiting for customer sign off on designs.
Follow up conversation on receipt of signed documents returned.
Initial contact with customer.
Sent out Terms and Conditions and Letter of Engagement

Figure 26 - Notes (Contact)

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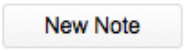
Create a new note

1) Click the **Documents & Notes** link to go to that section and switch to Notes using the navigation dots.

   Alternatively, select "Notes" from the *Quick Menu*.

2) Click on the 

button in the top right hand corner above the Notes list.
3) Type the note text into the "New Note" dialog box. (Figure 27)
4) Click "Save" to finish.

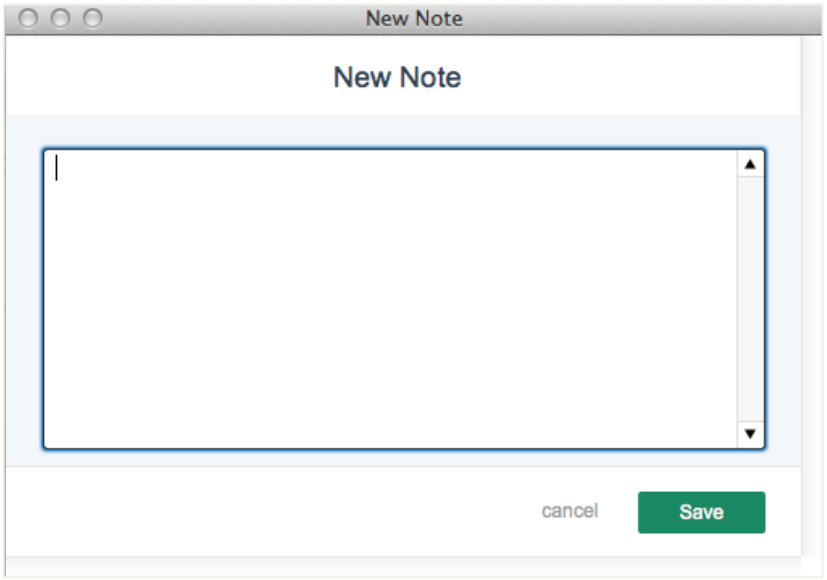


Figure 27 - New Note (Contact)

Edit Profile

This section contains all the main information for the Contact.

If you change any of these fields, ensure you click "Next" and then "Save" otherwise your changes will be lost.

Remember:
Do not double-click on these buttons. One click will save and clear these fields. If you double-click, the second click will clear all the information just saved.

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JOBS

About Jobs

The JOB module is where you manage your jobs or projects.

The financial status of the job is shown in detail here and this is where you can track how much the job is costing in terms of time and/or materials (expenses), and you can see at a glance if it is profitable.

The areas of the screen are as follows (Figure 28):

1) Main Job Header block. Shows the Job title, the customer name (links to the Contact record) and a description or scope of the job.
2) List of all Jobs in the system. Search for, or click on the row to view, another Job.
3) Detail sections for this Job (outlined in more detail below).
4) Quick Menu –links to sections / sub-sections.
5) Actions – buttons to create related records

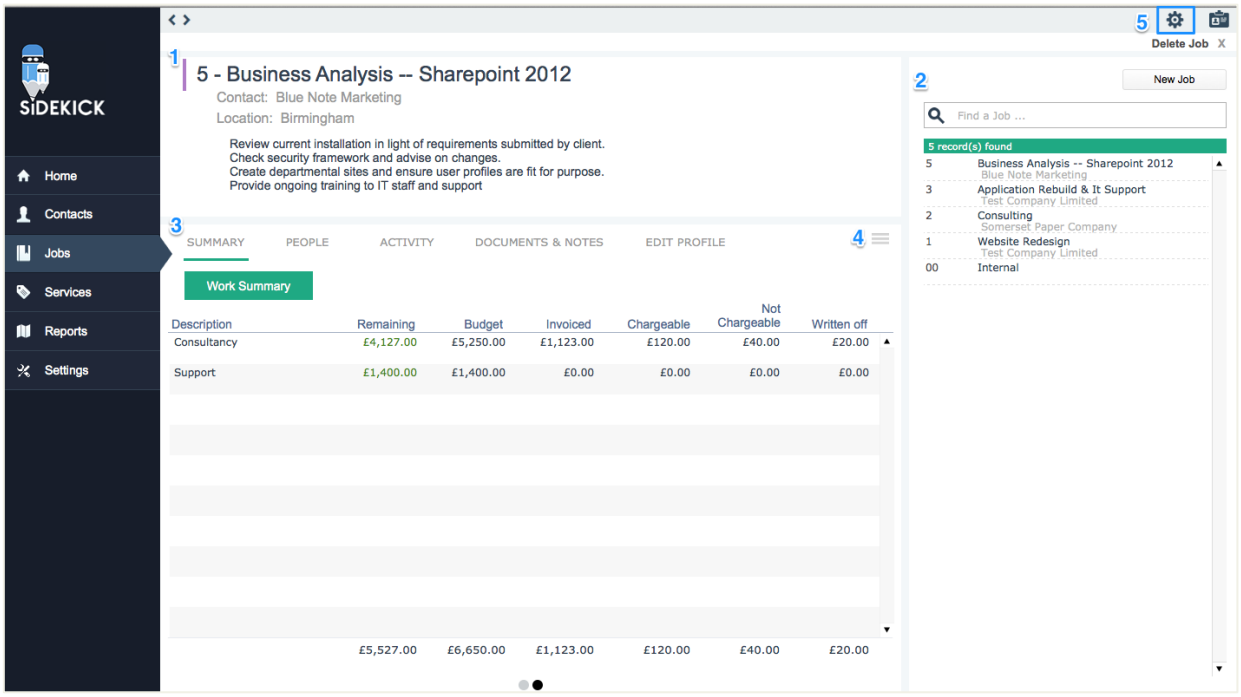

Figure 28 - Job screen layout

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Summary

Overview

This section is where you add items (services / products) to your Job and monitor your budgets and costs.

As Sidekick is a system designed to help you manage your business finances, it is also useful to think about the things you spend time on that you never charge for. You can still create those as items and log your time and expenses against them to give you an idea of the overall cost of doing that job. Just mark those time and expense entries as non-chargeable and they will not be picked up on invoices.

Example:
You provide a range of services to your customers. Before you get agreement to go ahead on the job, you might put in a fair amount of time doing analysis, creating tenders, writing documents, preparing quotes etc. If you don't record this time, you will never be able to quantify the cost of those activities to your business.

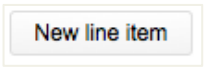
In Sidekick you can create a line item called (for example) "Investment in winning project" or "Tender process" and log your time against that item. You could even include these items in your Job templates created in the SERVICES module to ensure that that work doesn't get overlooked.

Once you have an idea what these activities cost your business, you can fine-tune your fees so your jobs are truly profitable.

You can only have 1 instance of an item on your Job. Change quantities if you need to adjust the Budget set for that item.

Add a job item

Job Items are products or services (or anything else you "sell"). You can pre-define these in the SERVICES module, but you can also create them directly from the Job.

1) Click the **Summary** link to go to that section, or click "Financial Summary" in the *Quick Menu*.
2) Click the 

button to add an item to your Job.
3) The "New Job Item" dialog box opens (Figure 29).
4) If you have grouped items together into a Template, you can select the template from the drop-down selector and all the items in that Template will be added to your Job.
5) Otherwise, select a single item from the list.

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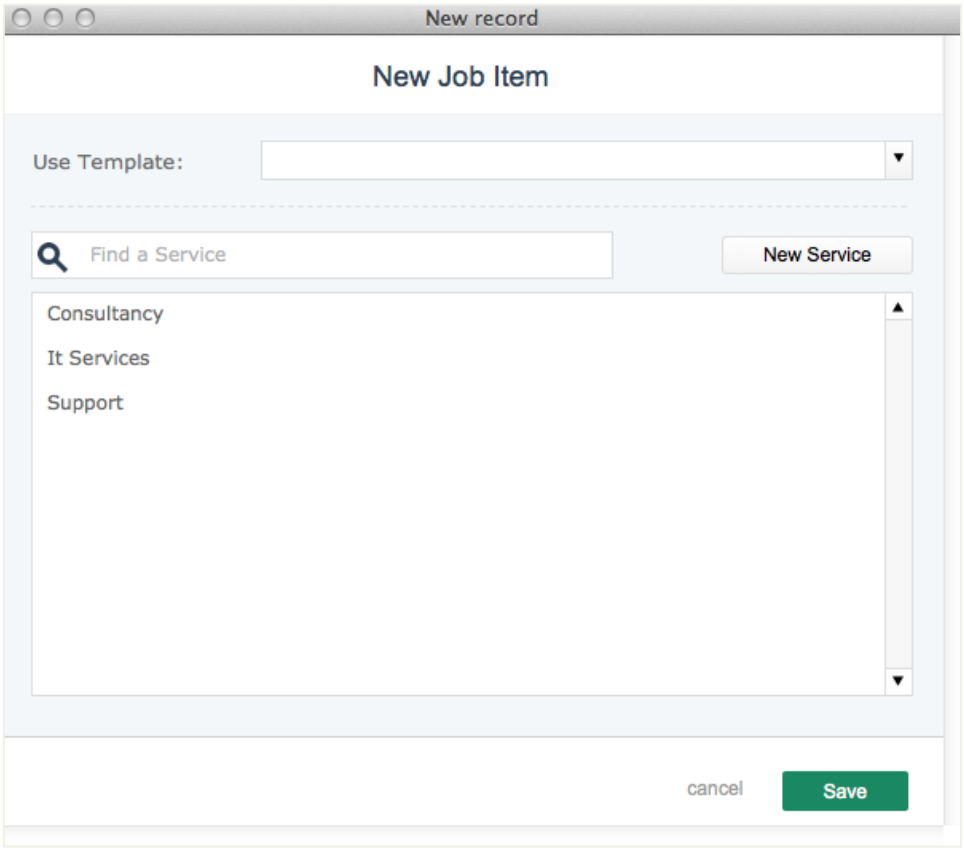
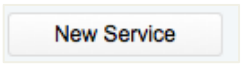


Figure 29 - New job item

Create a new item from a job

1) You can create a new item by clicking the 

button.
2) This will display the fields needed to define a new Service item (Figure 30).
3) If you want to save this item to add to future Jobs, put a check mark next to the field “Save for re-use?” (Figure 30)
4) Click Save to finish.

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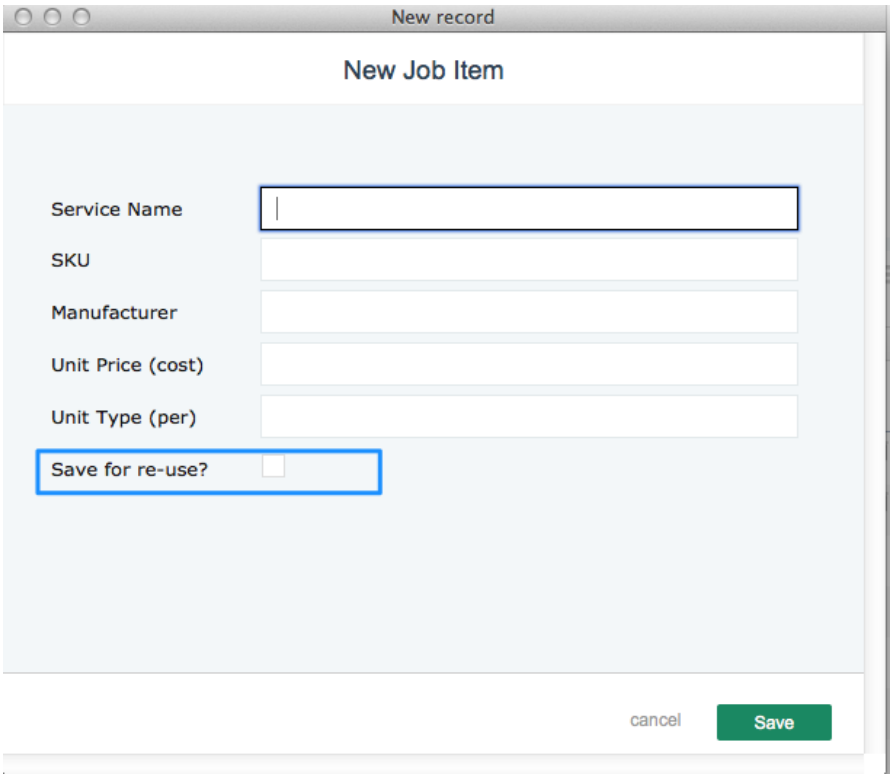

Figure 30 - New service item (Job)

Change a job item

Once the item has been added to the Job, you can adjust the totals to make it specific to this Job.

The item will come through from SERVICES with the standard quantity and cost, which is typically the cost of 1 unit of the item.

Set any mark-up you wish to apply for this Job (either amount or percentage).

Note: Check that the **Tax Rate** is set correctly.

1) Click on the item in the list (Figure 31)

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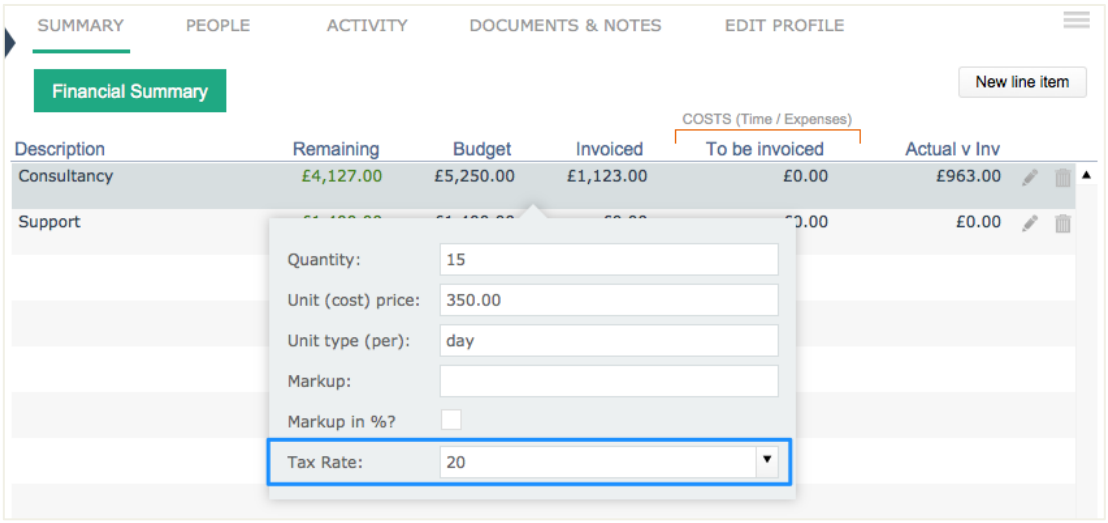

Figure 31 - Edit job item

Once you have set the Amounts for the Job Item, this is now your **Budget** for that particular item. Any Time/ Expenses or Invoice line items created against that item will calculate against the Budget.

If your costs (Time & Expenses) exceed your **Budget**, the **Amount Remaining** will be highlighted (Figure 32)

Figure 32 - Job item over budget (Job)

If this happens, this Job will also show up on the Dashboard as having an item over budget (Figure 33).

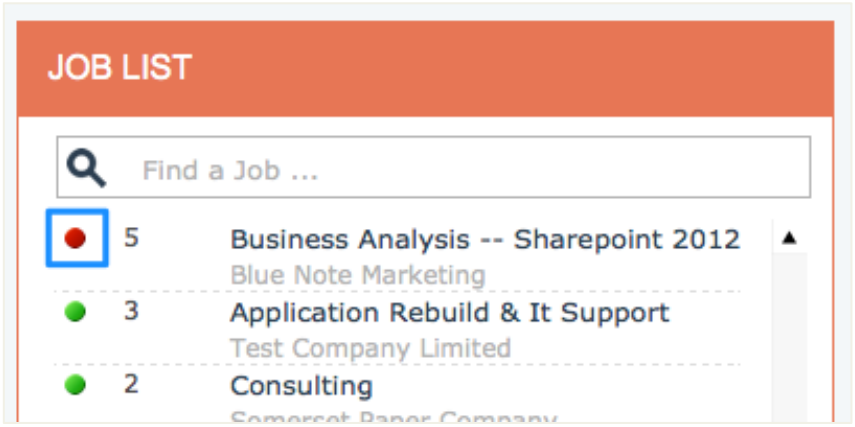

Figure 33 - Job item over budget (Dashboard)

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Financial Summary

This shows you an overview of how the Job is doing (Figure 34)
All totals reflect the total value excluding any taxes.

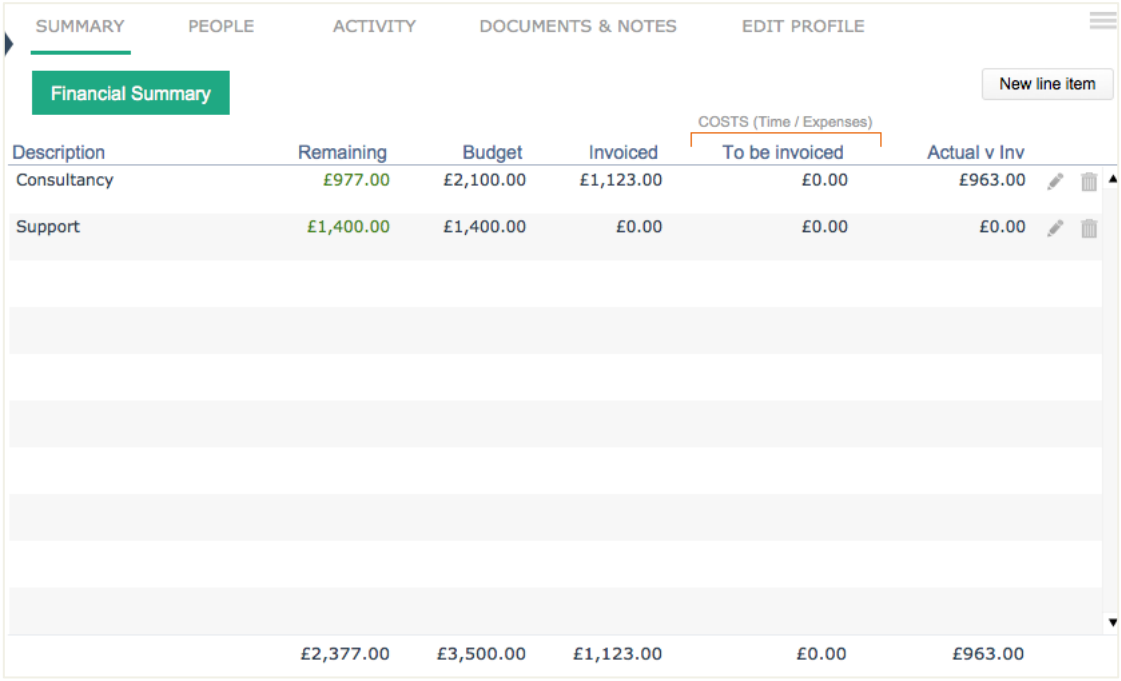

Figure 34 - Financial summary

Calculations explained

Field Name	What it means
Remaining	*Budget – (Invoiced + To be Invoiced)*
Budget	*Qty * Unit Price*
Invoiced	*Total amount invoiced against this line item*
To be Invoiced	*Total of all chargeable work logged against this item but not invoiced*
Actual v Inv	*Total of all work (chargeable + non-chargeable + written off) vs Total Invoiced*

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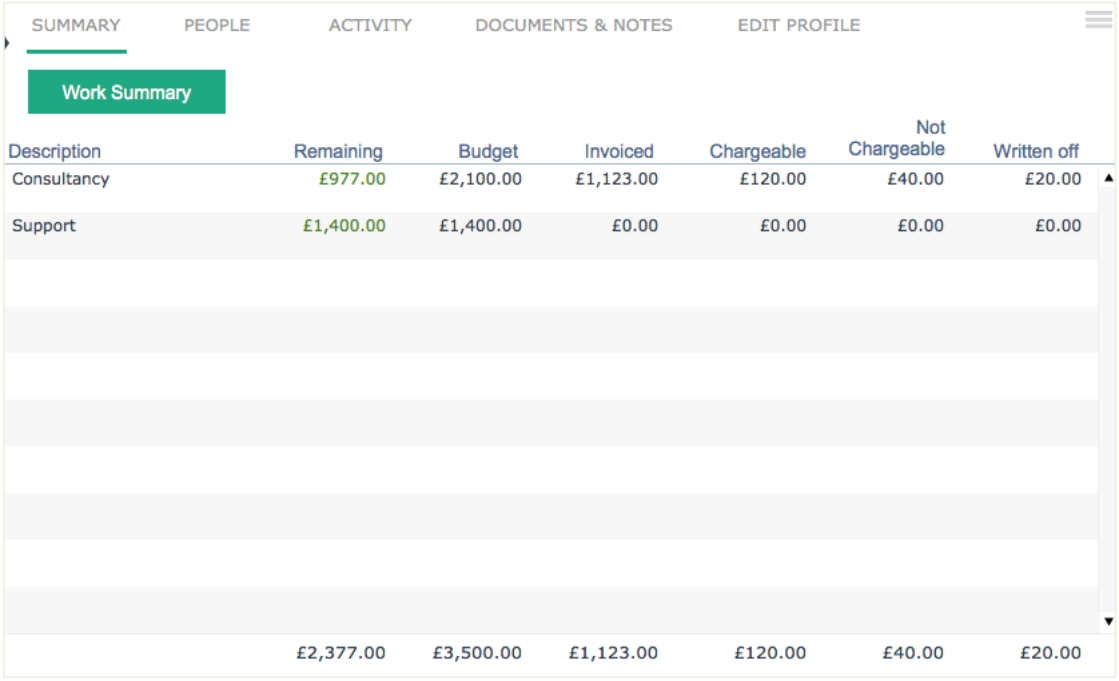
Work Summary

This includes all Time and Expenses entered in the system (Figure 35).
This doesn't include any "extra" amounts that might have been invoiced against an item, only work (costs).



Description	Remaining	Budget	Invoiced	Chargeable	Not Chargeable	Written off
Consultancy	£977.00	£2,100.00	£1,123.00	£120.00	£40.00	£20.00
Support	£1,400.00	£1,400.00	£0.00	£0.00	£0.00	£0.00
	£2,377.00	£3,500.00	£1,123.00	£120.00	£40.00	£20.00

Figure 35 - Work summary

Calculations explained

Field Name	What it means
Remaining	*Budget – (Invoiced + To be Invoiced)*
Budget	*Qty * Unit Price*
Invoiced	*Total amount invoiced against this line item*
Chargeable	*Total of all chargeable work logged against this item*
Not chargeable	*Total of all work flagged as not chargeable against this item*
Written off	*Total of all work written off against this item*

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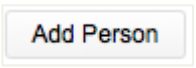
People

This section is where you link all People associated with this Job. This includes people external to your organisation (People) as well as internal staff who are working on the Job (Team).

Add a person to the job

1) Click the **People** link to go to the correct section. Or click "People" in the *Quick Menu*.
2) Click on the 

button to bring up the dialog box.
3) If you have a long list, you can search by typing into the search bar. Otherwise, click on a name to select a Person from the list (Figure 36).

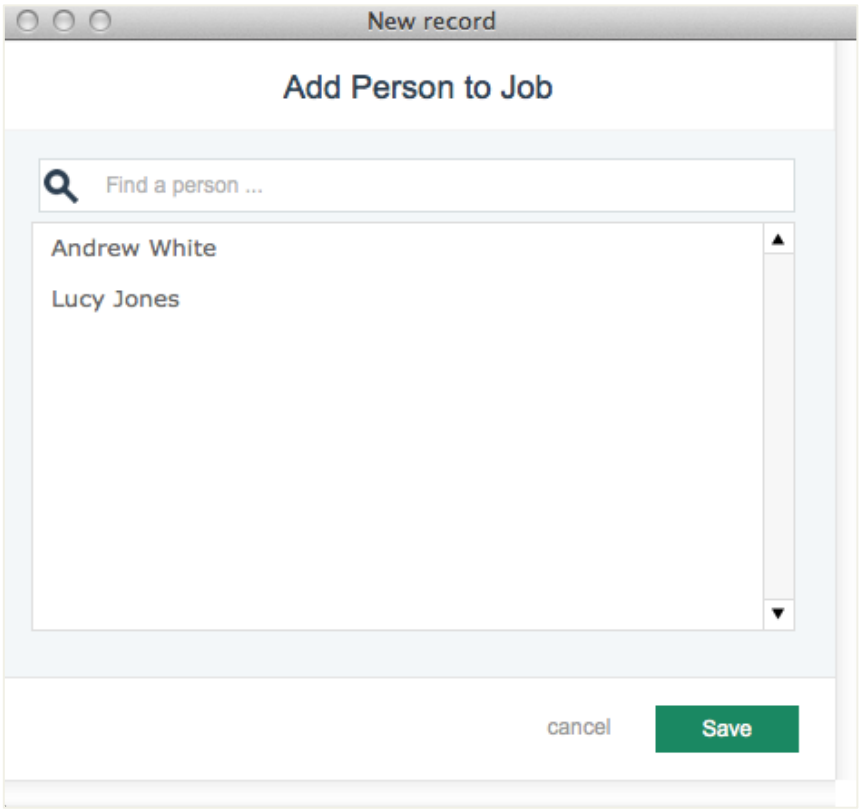


Figure 36 - Add person to job

Once the Person has been added to the Job, you can set a Role for them by clicking on the entry in the list (Figure 37).

Click out of the **Role** field when finished.

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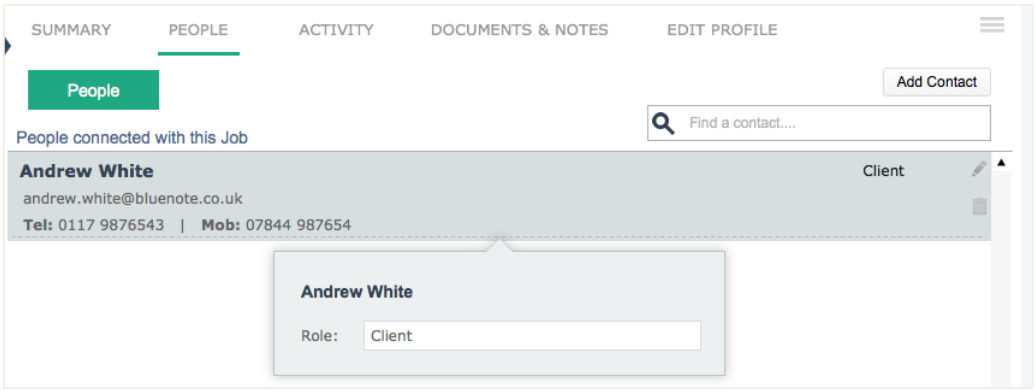

Figure 37 - Set Role

Add staff to the job

This is where you add your internal Team members (or staff). You should have already added your staff members to Sidekick in the SETTINGS module.
See (Users) for more information.

Charge rates for Time
Users will be added to the Job with their default Charge Rate, which was set in SETTINGS. You can, however, change this rate after the user has been added to the Job. This allows you the flexibility to set the rate on a job-by-job basis.

Example:
You might start a job with a user on a certain rate and you might revise it and want to change it mid-way through the job. This is not a problem. All the Time added by the user up to that point would have calculated the cost based on the rate at the time. After the change, any subsequent Time entries will pick up the new rate.

1) Click the **People** link to go to the correct section. Or click "Team (Staff)" in the *Quick Menu*.
2) Click on the Add Staff button to bring up the dialog box.
3) Search for a user, or click on a name in the list to add to the job (Figure 37)

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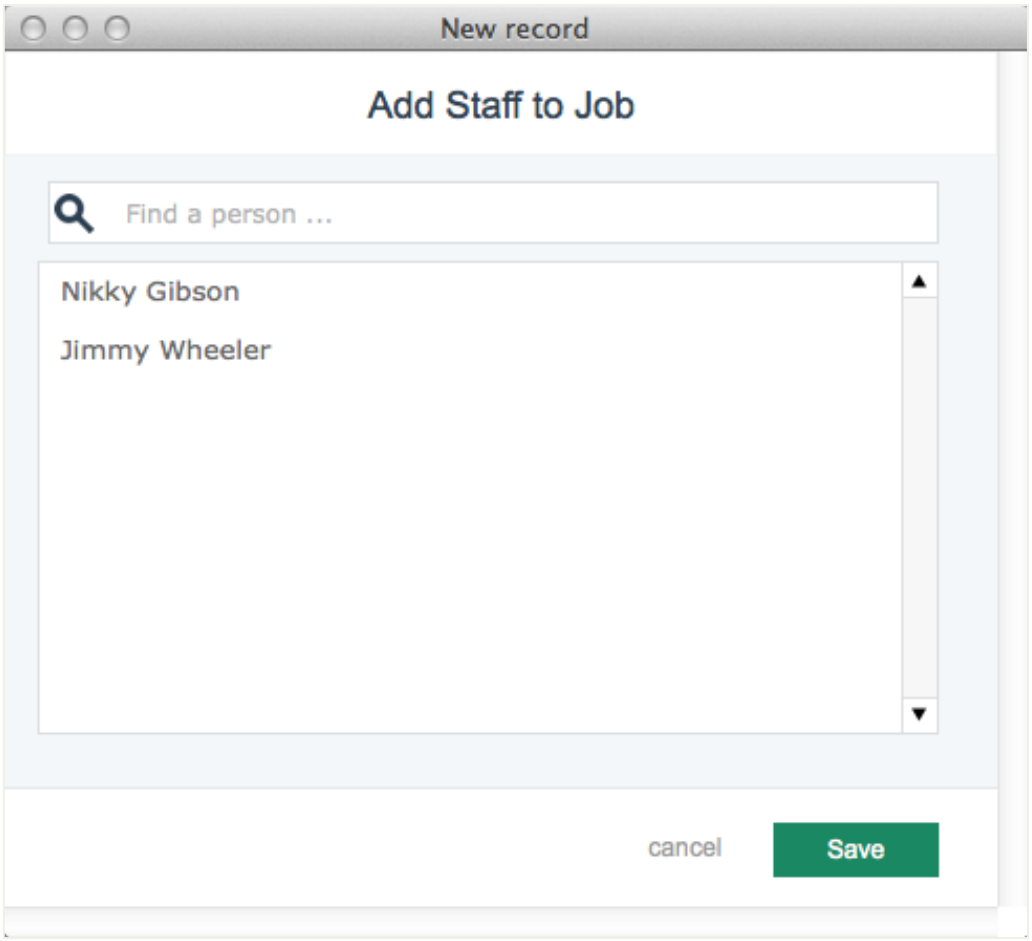

Figure 38 - Add Staff to job

Once the user has been added to the Job, you can set the Job Role and also the charge rate to use on this Job.

Click on the user's name in the list to display the popup box (Figure 39)
Click away when you have made your changes.

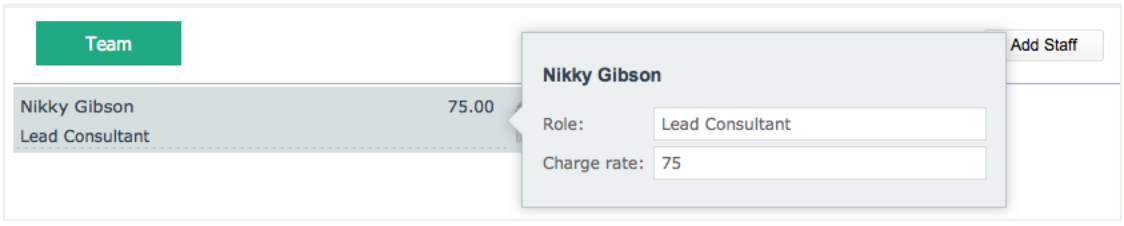

Figure 39 - Set role and charge rate

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Activity

This section shows the detail of the job activity, *Time*, *Expenses* and *Invoicing*.

The Amounts associated with the 3 main areas of activity are displayed as summaries above the sub-sections. This is for activity considered "in progress" so Work that has yet to be invoiced, and invoices that are outstanding, or yet to be paid (Figure 40)

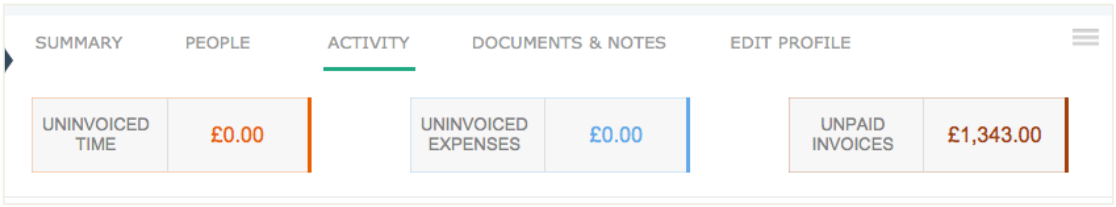

Figure 40 - Activity summaries

Time

This shows all time entered for this Job.

Use the Filter to change the information displayed in the list below.

Figure 41 - Time filter

Create a new time entry

You can create an entry using the *Quick Work Entry* block on the Dashboard (HOME). This will allow the logged in user to create entries for all the Jobs they are allocated to. A further description can be found in the HOME section of this Guide.

If you want to create a time entry for someone else, or you happen to be on the Job screen, you can create an entry from the Job. This is only for the current Job record…

In the top right hand corner of the screen is the Actions icon

1. Click on this to view the Action options.
2. Select "New Time Entry" (Figure 42).
3. This will display the dialog box. (Figure 43)
4. Enter all the required fields.
5. In the **Related to** field, be sure to link the entry to the correct service item on your Job.

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6. If the time is “Chargeable”, the selected user’s charge rate (as set on the Job) will be used.

   **** Ensure that a charge rate has been set on the Job otherwise the calculated Value of the work will be incorrect**

7. Click “Save” to finish

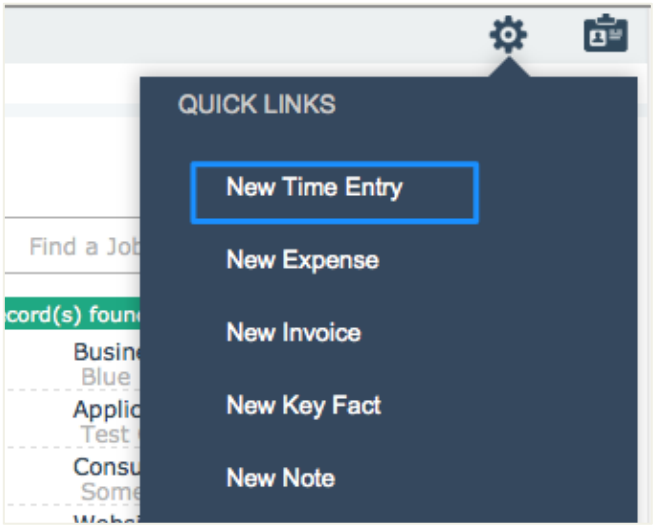

Figure 42 - Job actions

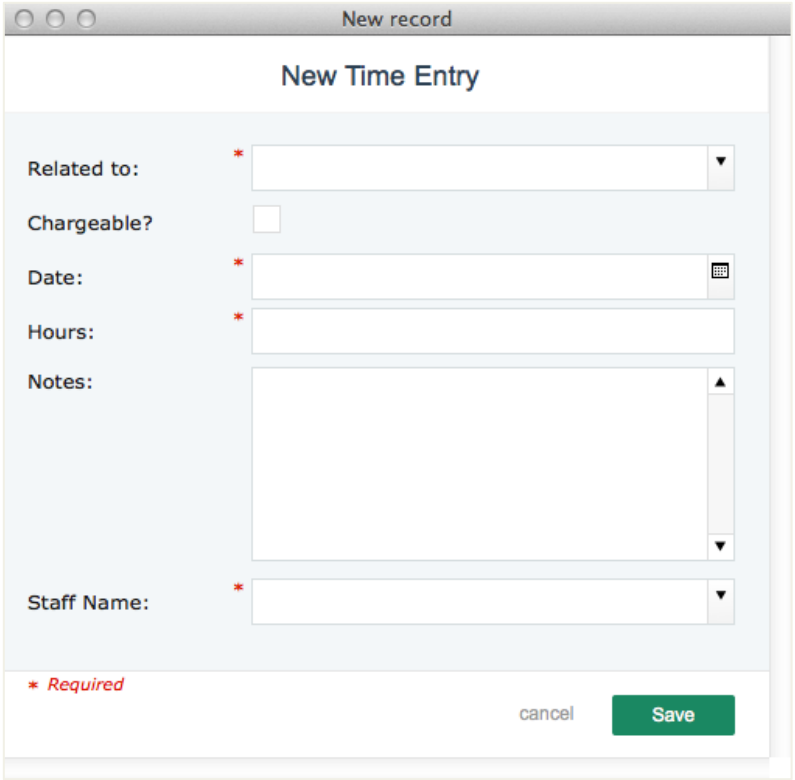

Figure 43 - New time entry (Job)

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Change a time entry

Note: You can change the details of a time entry on a Job up until the point that it gets invoiced. After that, clicking on the item will display the details but you can no longer change them.

1. Click the **Activity** link to go to that section – or select "Time" from the *Quick Menu*.
2. Click on the entry in the list to view the details (Figure 44)
3. Make your changes and click away to save.

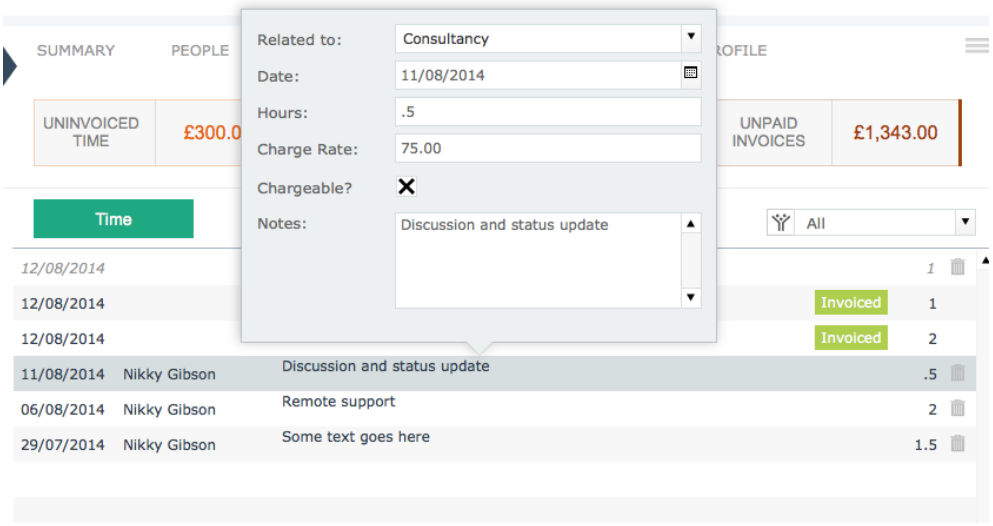

Figure 44 - Edit time entry

Expenses

Expenses work almost the same as the Time entries.

You can record expenses on the HOME screen in the *Quick Work Entry* block (see the HOME section of this Guide.)

Note: be careful about how you apply Taxes. If the expense is "Chargeable" it will be picked up for invoicing. If you apply Taxes on your invoice, enter the Net Amount of the expense here.

Create a new expense

This is the same as for time entries (see above), but select "New Expense" from the Actions.

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Change an expense

This is the same as time entries above, but select the Expenses sub-section instead.

Invoices

Invoices are created from the Job.

Create a new invoice

1. Go to the Job you wish to invoice, and click the Actions icon in the top right hand part of screen.
2. Select “New Invoice”.
3. This will display a new window where you can fine-tune your invoice (Figure 45)

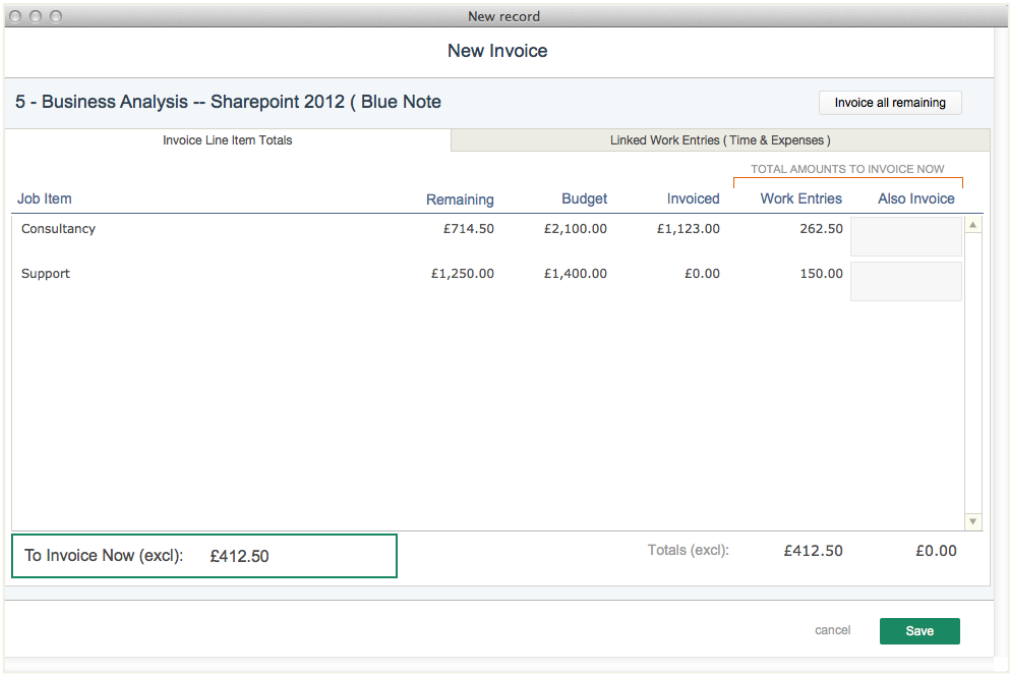

Figure 45 - New invoice

4. The new invoice will pick up all the work (time / expenses) that are “Chargeable” and not yet invoiced. The Total Value of all those entries is displayed in the “Work Entries” column.
5. In addition to invoicing for Work, you can choose to invoice additional amounts in the column “Also Invoice”.
6. To review the Work you are going to invoice now, click on the tab “Linked Work Entries (Time & Expenses)”. This will display a list of all the Work picked up on this invoice (Figure 46).
7. When you are happy with your invoice, click “Save” to finish.

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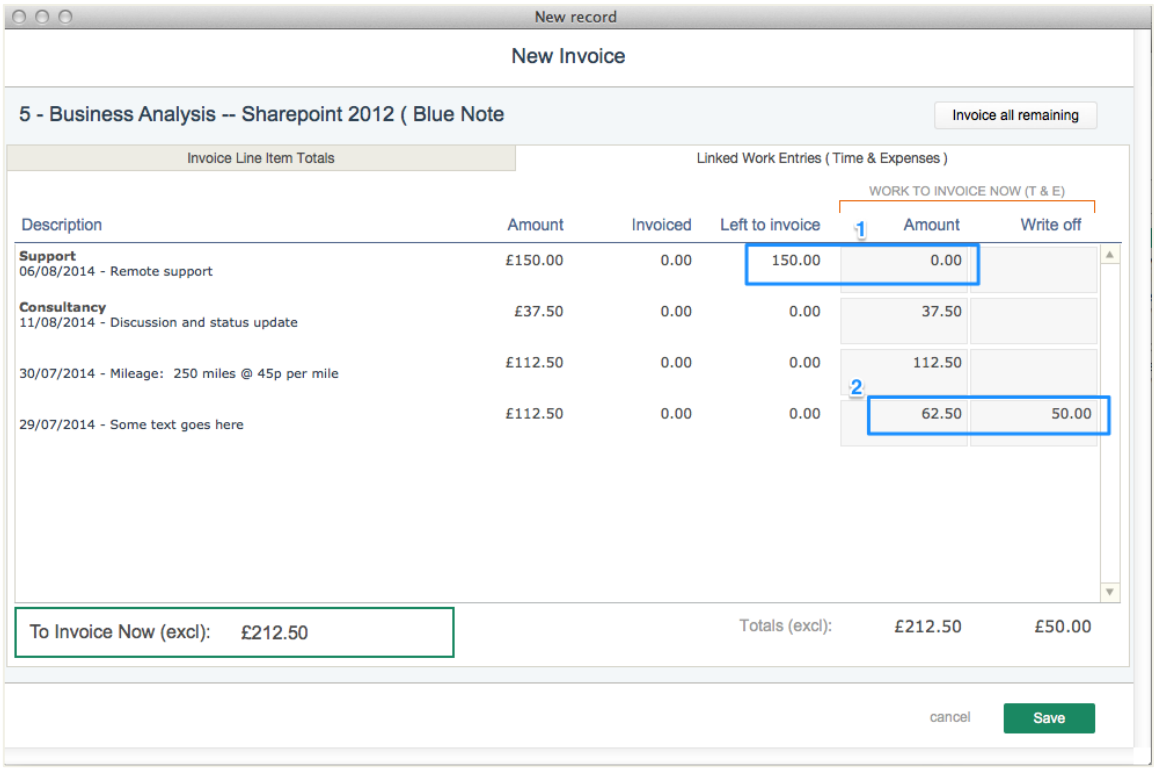

Figure 46 - New invoice

Examples for invoicing:

If you wish to exclude work from this invoice so you can invoice it later, just remove the Amount (or enter 0 in the Amount field) for that Item (see 1 on Figure 46). You will see that the Amount in the "Left to Invoice" column adjusts and the work remains to be invoiced.

If you know you can't invoice for some work you have done, then you can Write Off the amount by entering it into the "Write Off" column for that item. You can also part-invoice and part-write off... (see (2) on Figure 46)

Finally, if you want to include the work you have done, and you also want to invoice everything else up to the Budgets set for each item, just click on the Invoice all remaining *button and the system will fill in the amounts remaining.*

When the invoice has been created, you will see the list of Invoices for the Job.

Change an invoice

To finalise the invoice, you will need to set an Issue date, check the Headers and Footers, and perhaps rework some of the line items.

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To do this, click on the Invoice Number in the list to view the invoice details (Figure 47)

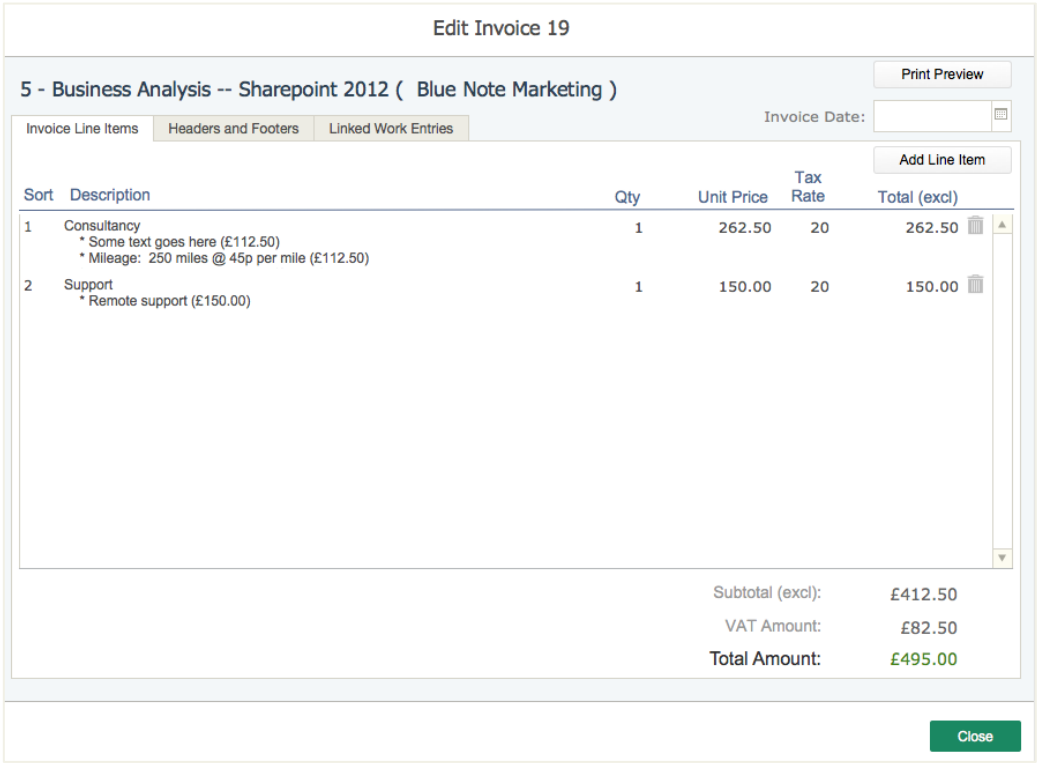
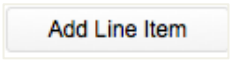


Figure 47 – Change / finalise invoice

1. To change any of the values on a line item, simply click on the text you wish to change and start editing.
2. Add a new Line Item by clicking the 

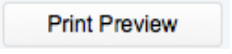
button.

At this point, you can't change the Work entries any more. If you wish to unlink them, the only way is to delete either the entire invoice or the line item they are linked to.

You can change the order in which the line items print by changing the "Sort" values.

The Invoice will print using the Template specified in SETTINGS. See (Invoice preferences) for more information.

Print or PDF an Invoice

1. To Print an Invoice, click the 

button.
2. This will display the invoice as it will print (Figure 48).

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3. Use the options on the bar at the top to change print settings, page setup, or to print.
4. When you are finished, click the blue “Continue” button on the task bar (Figure 48)

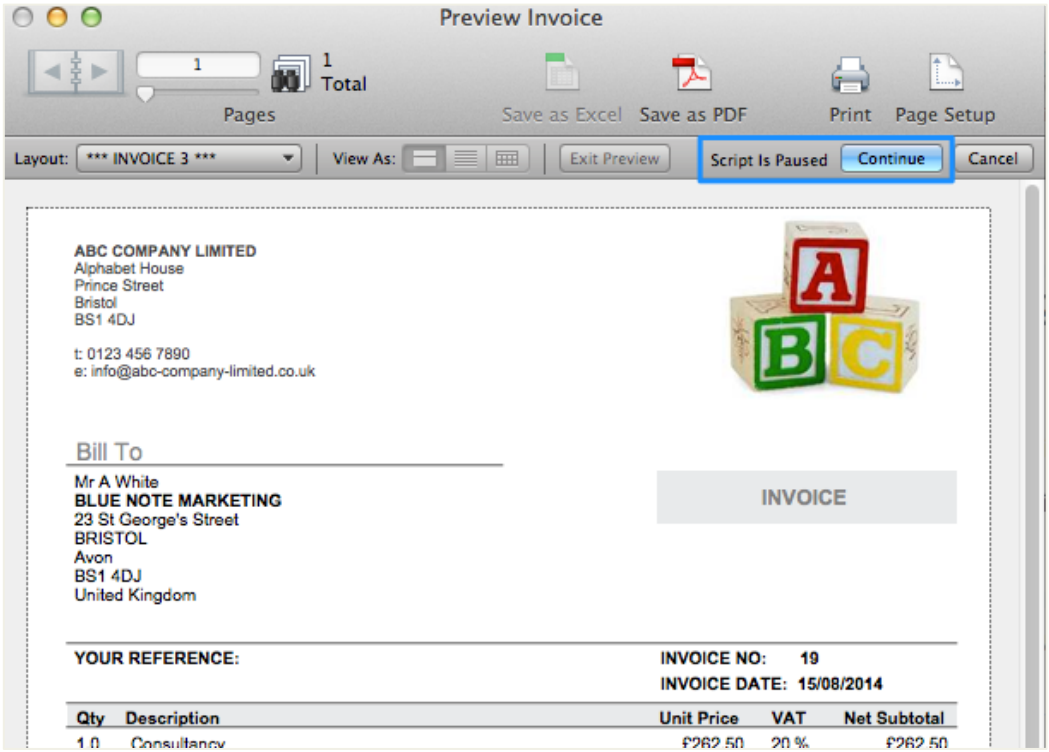

Figure 48 - Print invoice

Note:
If you are using **Sidekick Workgroup**, you can save the Invoice as a PDF using the button on the task bar.

If you are using **Sidekick Solo**, and you are using Windows, you will need to install a PDF print driver on your computer and then print to the PDF “printer” if you wish to save your documents as PDF.
(eg: http://www.cutepdf.com/products/cutepdf/writer.asp).

On a Mac, just use the in-built *Print / PDF (Save as PDF)* option on your machine.

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Documents & Notes

This section can be used to manage communications about the Job.

This can either be in the form of Notes you record in Sidekick, or documents produced outside in another application (eg: Word, Excel etc).

All members of your team can save files within Sidekick to allow for easy discovery and retrieval.

Documents

This sub-section can be used for storing documents. Files are uploaded into Sidekick.

Create a new document

5) Drag your file into the upload zone in the "Documents" sub-section. Or click in the upload zone to browse for your file (Figure 49).
6) Click on the document in the list (not the thumbnail) to set a Category and a Description. Any of the text in these fields can be used to **Find** the document in the Search field above the list.
7) Click the thumbnail to launch the document in the original application.

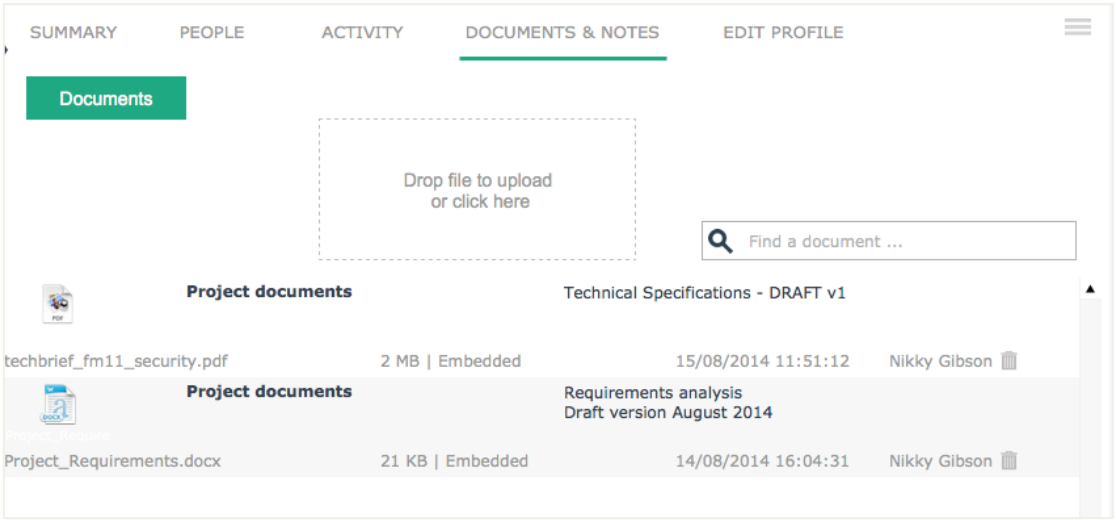

Figure 49 - Documents (Job)

Notes

Use this sub-section to record incidental notes against the Job. You might use this for tracking all your communications about the job, or for recording reminders.

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This is especially useful as a central repository to keep this information in one place so everyone can see a whole history of events (Figure 50)

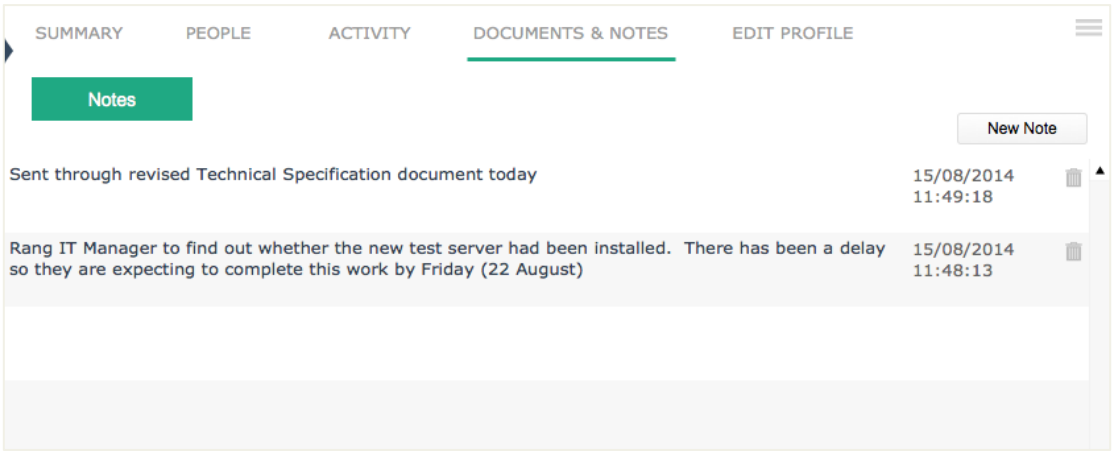
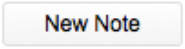

SUMMARY
PEOPLE
ACTIVITY
DOCUMENTS & NOTES
EDIT PROFILE
Notes
New Note
Sent through revised Technical Specification document today
15/08/2014
11:49:18
Rang IT Manager to find out whether the new test server had been installed. There has been a delay so they are expecting to complete this work by Friday (22 August)
15/08/2014
11:48:13

Figure 50 - Notes (Job)

Create a new note

5) Click the **Documents & Notes** link to go to that section and switch to Notes using the navigation dots.

   Alternatively, click on "Notes" in the *Quick Menu*.

6) Click on the  button in the top right hand corner above the Notes list.
7) Type the note text into the New Note dialog box. (Figure 51)
8) Click "Save" to finish.

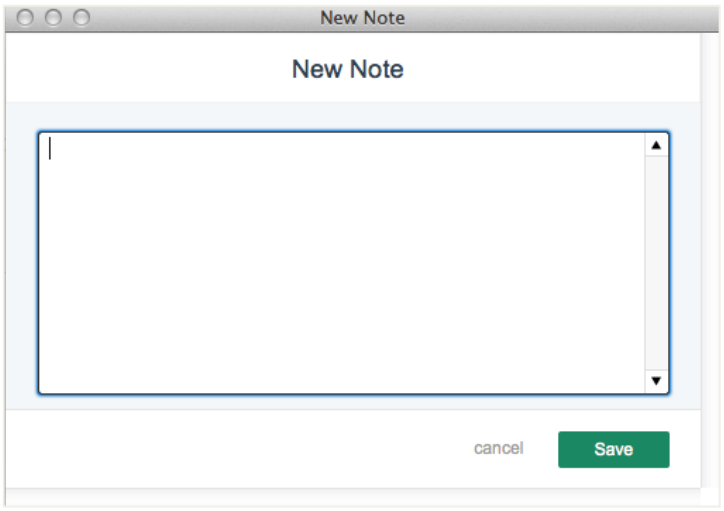


Figure 51 - New Note (Job)

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Key Facts

There is a further sub-section under the "Documents & Notes" section on the Job, for recording "Key Facts" about your Job (Figure 52).

As every business is different and every Job is different, you can use this section to store any information that is meaningful to your business.

You can change what you call this sort of information, in SETTINGS.

For easy rediscovery of this information, the search bar above the list of Key Facts will search any text entered in any of the fields.

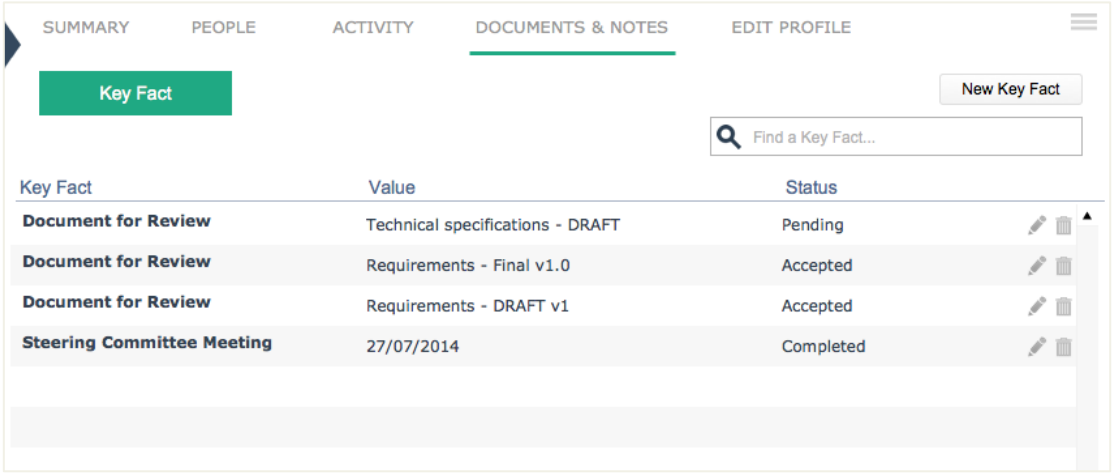
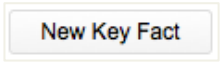


Figure 52 - Key Facts (Job)

1. Go to "Key Facts" by clicking the **Documents & Notes** link and use the navigation dots at the bottom to get to the right sub-section. Alternatively, click on "Key Fact" from the *Quick Menu*.
2. Click on the 

button to create a new record.
3. This will bring up a new record dialog (Figure 53)
4. The **Label** field is a category of information you are collecting. You can create your own categories or terms to use in this drop-down.

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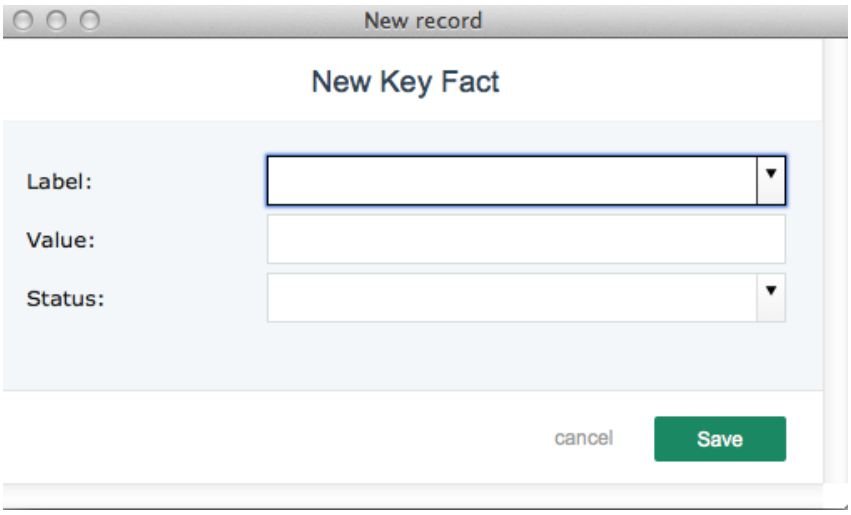

Figure 53 - New Key Fact

Edit Profile

This section contains all the main information for the Job.

If you change any of these fields, ensure you click “Next” and then “Save” otherwise your changes will be lost.

Remember:
Do not double-click on these buttons. One click will save and clear these fields. If you double-click, the second click will clear all the information just saved.

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SERVICES

About Services and Templates

The Services module is for managing all the things that your business "sells". Sidekick calls these Services by default, but you can change the terminology of the system to match your business. This is done in SETTINGS (Settings / Naming conventions)

The items that you create in this module are what you add to your Jobs and these are things you charge your customers for. They could be services or products or any combination of the two.

These are the items you link your costs to (time and expenses). As such, you can create items to track internal costs. Sidekick ships with a single Job in it called "Internal". You could create service items for tracking internal costs.

Before you start using Sidekick, you might want to think about this module and decide how you want to see your costs and what you might need to report.

Example:
You want to have a better idea where your users (or yourself if you are a sole business owner) spend their time. This will allow you to see how profitable your business is overall.
Use the "Internal" job to track these costs. Create Service items for all the different activities your users spend their time on. (eg: Marketing, Admin, Finances, Winning new work, CPD, Annual Leave etc). This time should be marked as non-chargeable because there is no client to bill and you don't want it throwing your work in progress figures out… But, you can run reports on that job and analyse where time is being spent.

If you buy in things for your Jobs, or you have to pay fees on behalf of your client during the course of your work, it is worth considering creating separate service items for these things rather than lumping them with time-based service items. For example, you could have a service item called "Expenses" and keep your disbursements separate from your fee earning work. Or if you travel a lot and you want a record of that, create an item called "Travel & Mileage" or something and put your expenses against that item.

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Services

When you set up a service item or a product, you typically want to have the costs of a single unit of that item.

If you are a Consultant, then a service item would be a single unit of how you sell your time. If your fees are based on your hourly rate, then you will have 1 hour as the unit cost on your service item. If you work on a day rate, then it will be 1 day. The time you book against that, will go in at your charge rate so the service item is related to what you quoted to your customer.

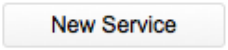
If you are selling a product, then the item will be 1 x the cost of the product. If you buy in the item from elsewhere, you could cost the item at the cost price (the price you pay to buy it in) and add a mark up to the item in Sidekick.

You might have a situation where you could sell one item in different ways. For example, a subscription to a magazine. You might structure your service items as follows:

Item name	Unit cost	Quantity	Per
Publication A	5.99	1	ea
Publication A - 6 month subscription	155.74	1	6 months
Publication A – Annual subscription	311.48	1	year

You could equally just have Publication A, and add it to your Job and change the quantity to 52. But this way, you will be able to report on your sales and see that you have sold more 6-month subscriptions than any other item.

Add a new service item

1. Go to the SERVICES module and click on the 

button.
2. Give the Service Item a name in the dialog box (Figure 54)
3. Enter the costing information in the Profile (Figure 55) and click “Save” to finish.

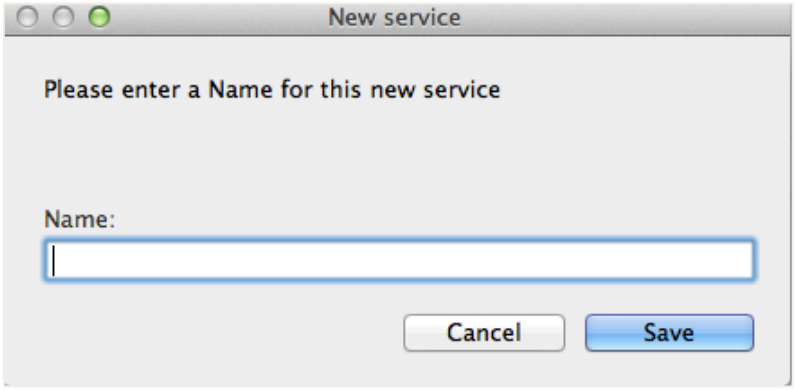


Figure 54 - New service item

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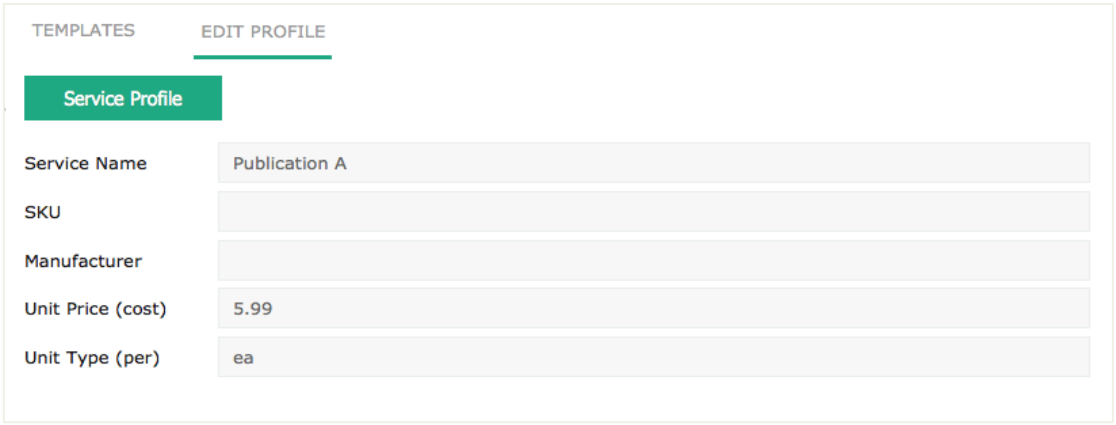

Figure 55 - Edit Profile (Service Item)

Remember:
Do not double-click on these buttons. One click will save and clear these fields. If you double-click, the second click will clear all the information just saved.

Templates

If you routinely want to add multiple items to your jobs, you can use "Templates" to group them together. Once you have assigned items to a Template, you can select the Template from your Job and Sidekick will add all items in the template to the Job.

Sidekick is designed to help you manage your costs and to get a better overview, so even if you only have 1 item that the customer will actually pay for, you might want to track the time you spend on that Job doing other things. And if you design your Service items with this in mind, you could analyse how much time you spend on those activities across all your Jobs.

Create a new template

The first section on the Services screen is where you work with templates.

1. Click on the **Templates** link.
2. This will show any existing templates and underneath, the Service items assigned to those templates. You can assign items to multiple Templates.
3. To add a new Template, click the New Template button.
4. Enter a name for the new Template (Figure 56)
5. Click "Save" to finish.

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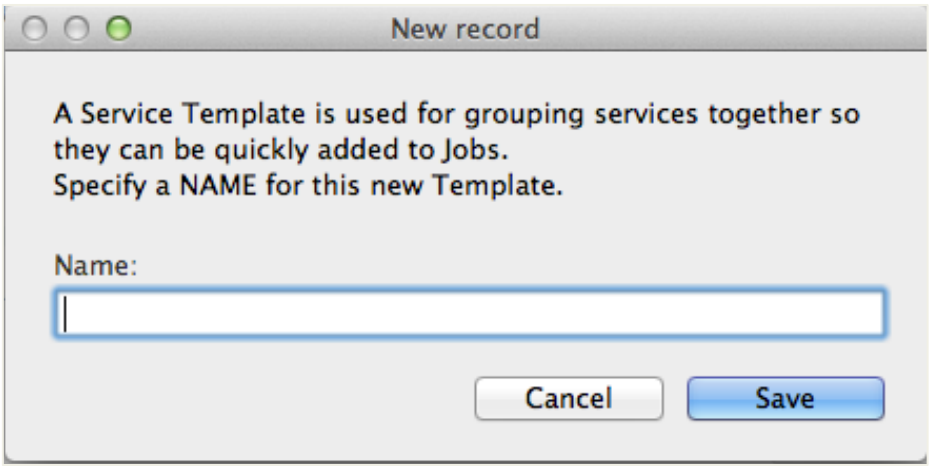
New record
A Service Template is used for grouping services together so they can be quickly added to Jobs.
Specify a NAME for this new Template.
Name:
Cancel
Save

Figure 56 - New template name

Add a service item to a template

1. Go to the Service item you wish to add to a Template.
2. Click on the

button
3. Select the Template you wish this item to be added to. The name will appear underneath. (Figure 57)
4. Specify the quantity of this item that gets added to the Job when you select the Template.
5. Click "Save" to finish.

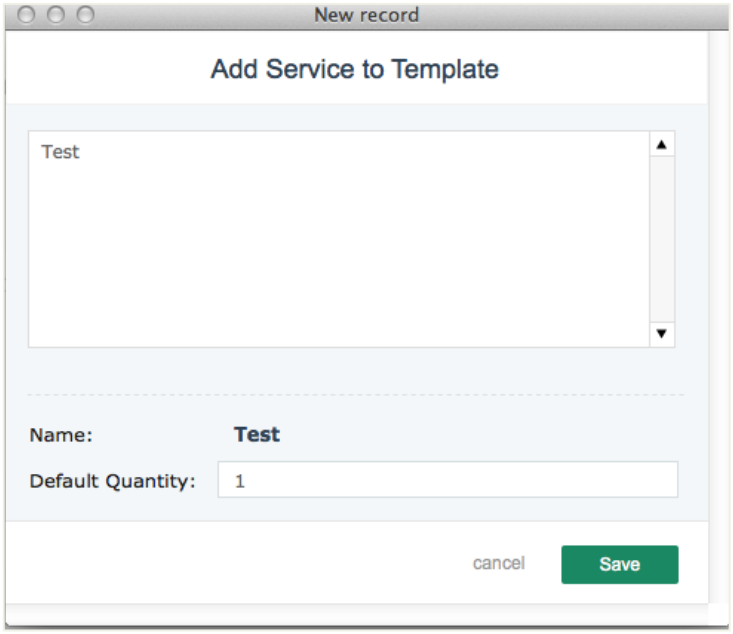

Figure 57 - Add service item to template

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REPORTS

Sidekick ships with the following standard reports:

Customer List
Transactions
Aged Debtors
Statements
Time / Expense Summaries
Staff Time Summary (Profitability)
Tax Summary
Sales Report (by Service)
Marketing (by Source)
List of Completed Jobs

In addition, there are 4 Invoice templates.

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SETTINGS

Users

Make sure you have at least 1 user set up as an Administrator (**Access Rights** = 1).

If you are using the TRIAL version or **Sidekick Solo** create a user record for yourself, set the default user as Inactive and then set your own record as Active.

If you will be recording time, make sure you set a Standard Rate. This can be modified on your Jobs.

Create a new user

1. Click on "Users" to go to the correct section. Or click "Users" in the Quick Menu.
2. Click the

button
3. The "New User" window will open. (Figure 58)
4. Fill out all the required fields.
5. Click "Save" to finish.

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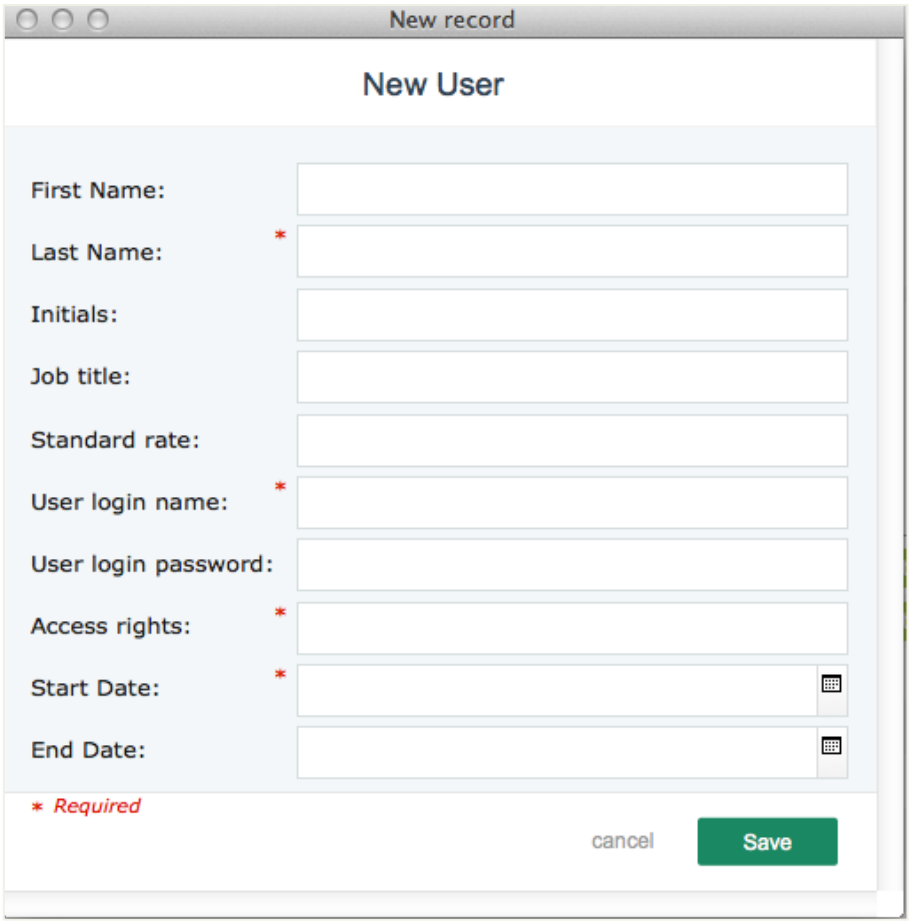

Figure 58 - Create new user

Make the user "Active" by changing it after it has been created.

Your Sidekick licensing has implications here. TRIAL versions allow only 1 "Active" user so you can create a new user but to set it as "Active", you need to make the default user "Inactive" (or delete it).

Note: If you delete the Default user, ensure you have at least 1 other Administrator otherwise you will not be able to access SETTINGS again.

Change a user

1. Click on the user in the row to see the details (Figure 59)
2. The user record is only valid between the Start and End Dates (you can leave the End Date blank).
3. You cannot log in with an "Inactive" user.
4. Reset the user password by clicking on the keys icon in the row.

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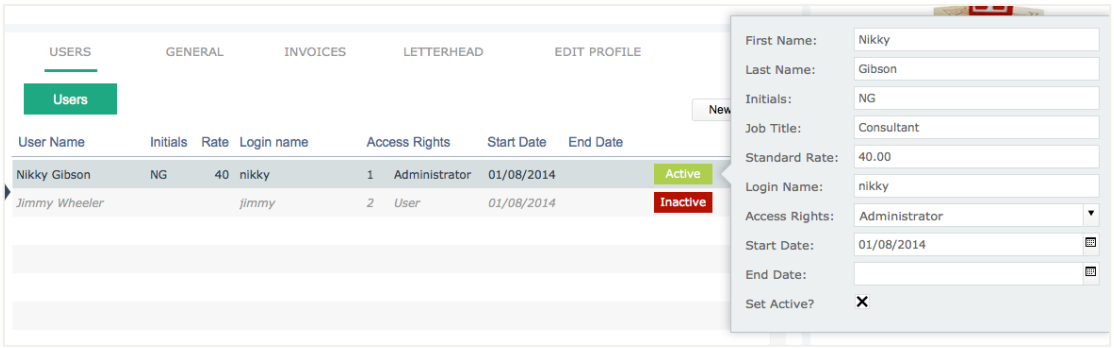


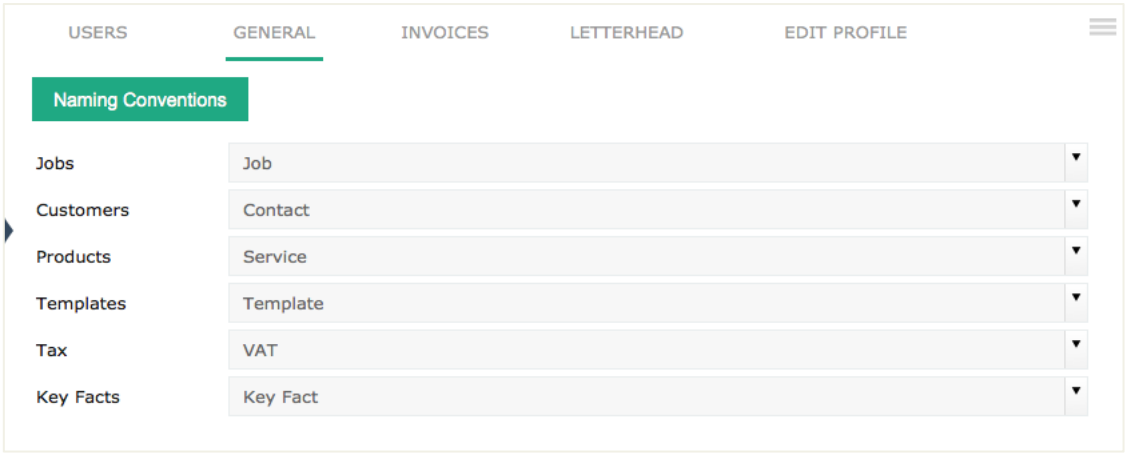
Figure 59 - Change a user

General

This section has different settings that apply to various areas in Sidekick. It is best to explore this and become familiar with these settings.

Naming conventions

This is where you can set Sidekick to use the terminology you use in your business. A change here will affect the entire system.



Country settings

Select your Country to get the right tax rates, terminology and currency. You can change these yourself in this section, or just click the relevant flag to set automatically.

Ensure your default tax rate has a yellow star next to it. If you charge tax (eg. VAT) on your invoices, the star should be next to the rate you apply.

If you are not registered and do not charge tax (eg VAT) then delete the Tax Rates

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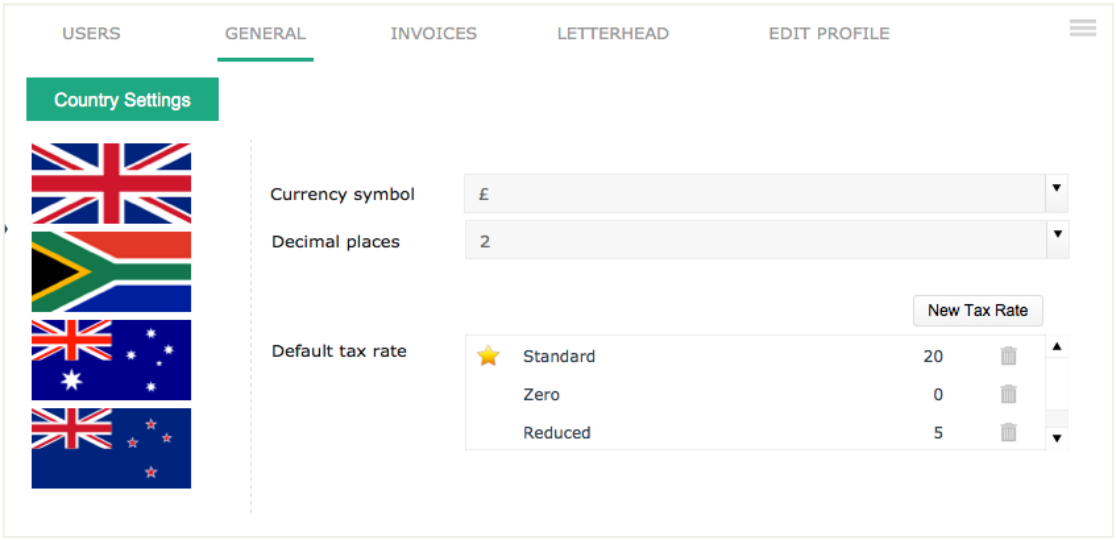

Figure 60 - Country settings

Numbering

This is where you set your numbering for your Jobs / Invoices and Credits. Set the number to start and Sidekick will number sequentially from there on.

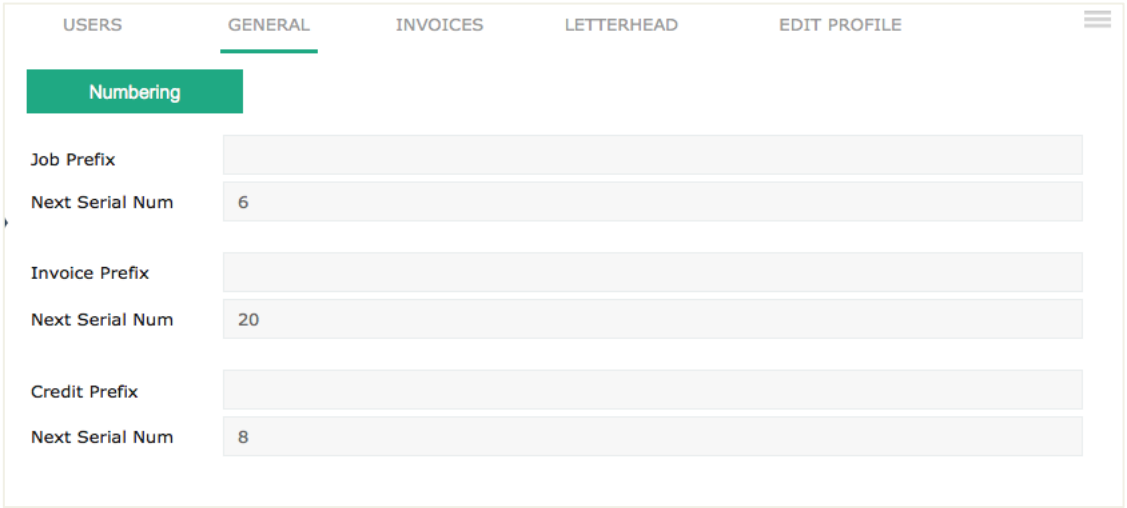

Figure 61 - Numbering

Invoices

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You can set default text that pulls into all your invoices. Turn these on by clicking the check box next to each option. Turn off by unchecking them.

Invoice preferences

Set the text to use in Invoice Headers and Footers.

Enable the Tax Summary on invoices.

Select the Template to use when printing your invoices.

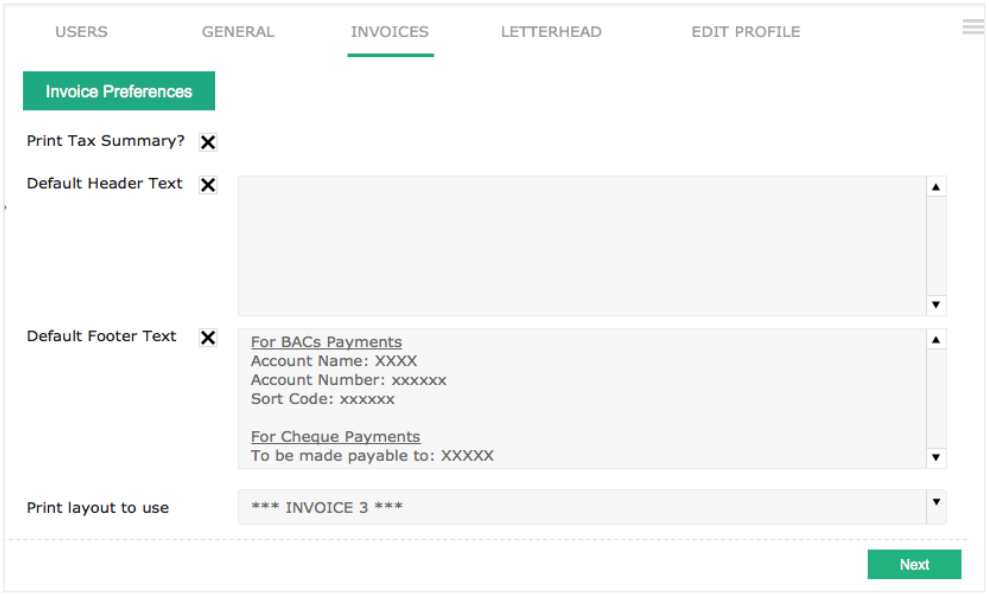

Figure 62 - Invoice preferences

Payment terms

As above, set the text to pull into your Invoices.

Set the default payment days to use (you can override this on the Contact record)

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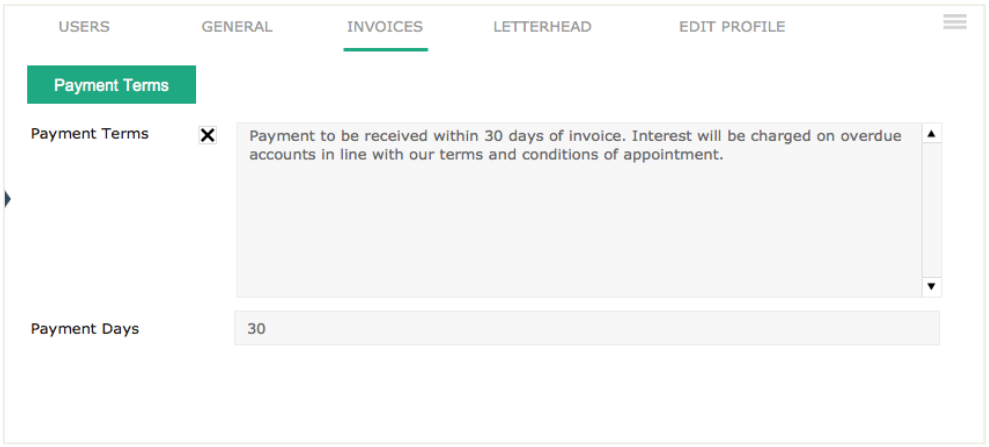

Figure 63 - Payment Terms

Letterhead

If you do not print your Invoices on a printed letterhead, you can set Sidekick up to print your company details and logo on your Invoices.

This section gives you options to enter your own text and to do limited formatting.

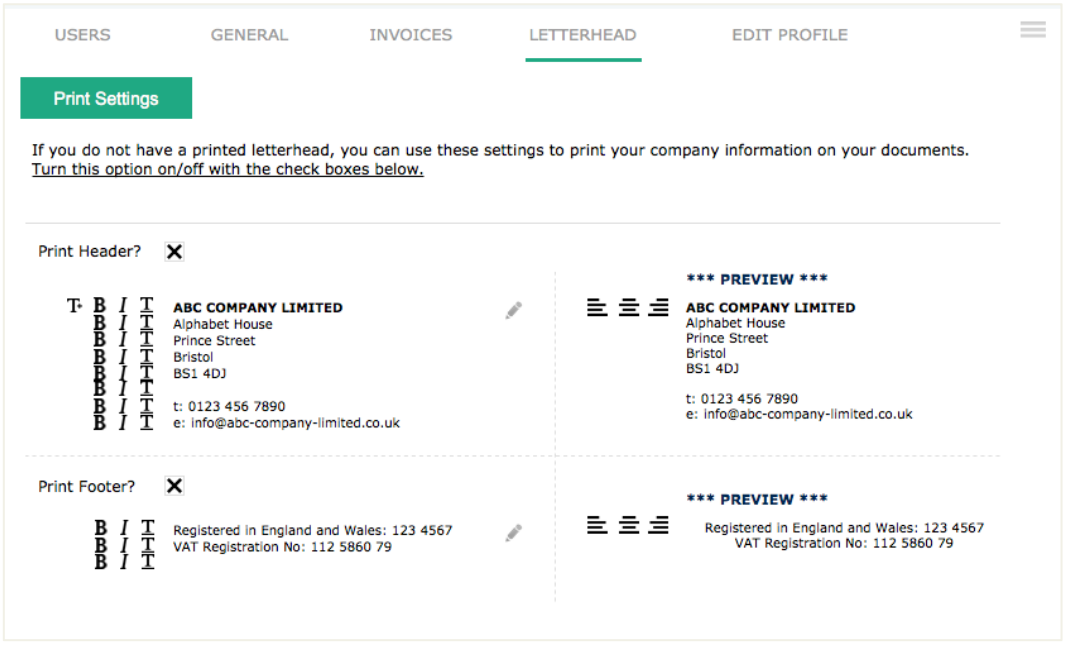

Figure 64 - Print Settings

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Edit Profile

This is where you enter your own Company details and upload your logo to Sidekick.

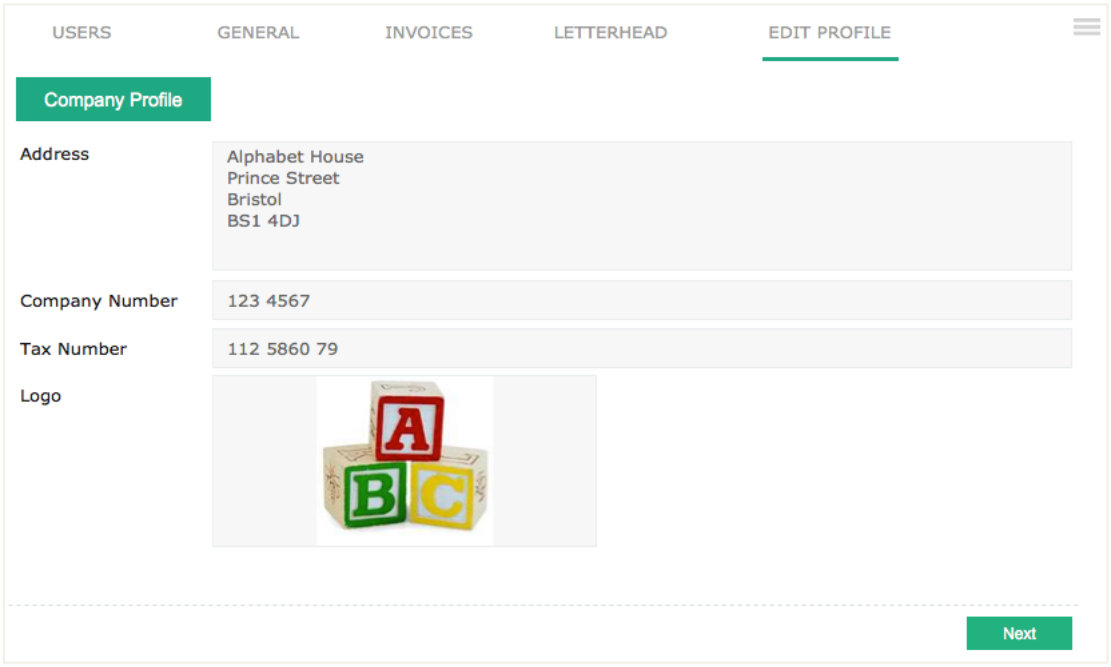

Figure 65 - Company details

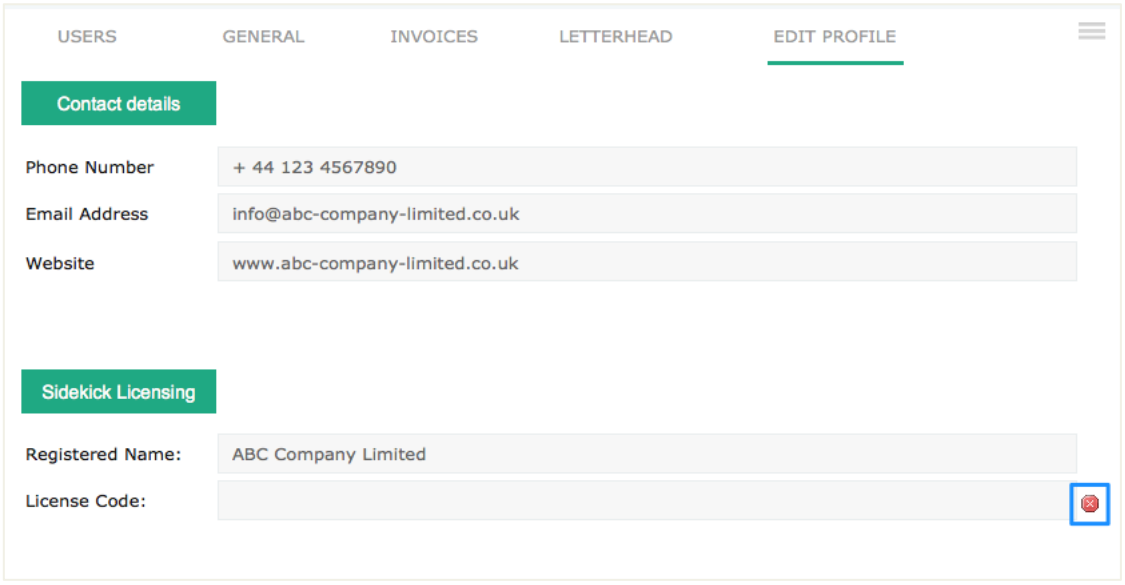

Figure 66 - Contact and licensing

If you enter a valid Sidekick License, the red cross will change to a green tick and Sidekick will validate both the registered name of your company and also the number of user licenses you have purchased.

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A summary of your company details will display in the panel on the right hand part of the screen, along with the Sidekick Licensing details.

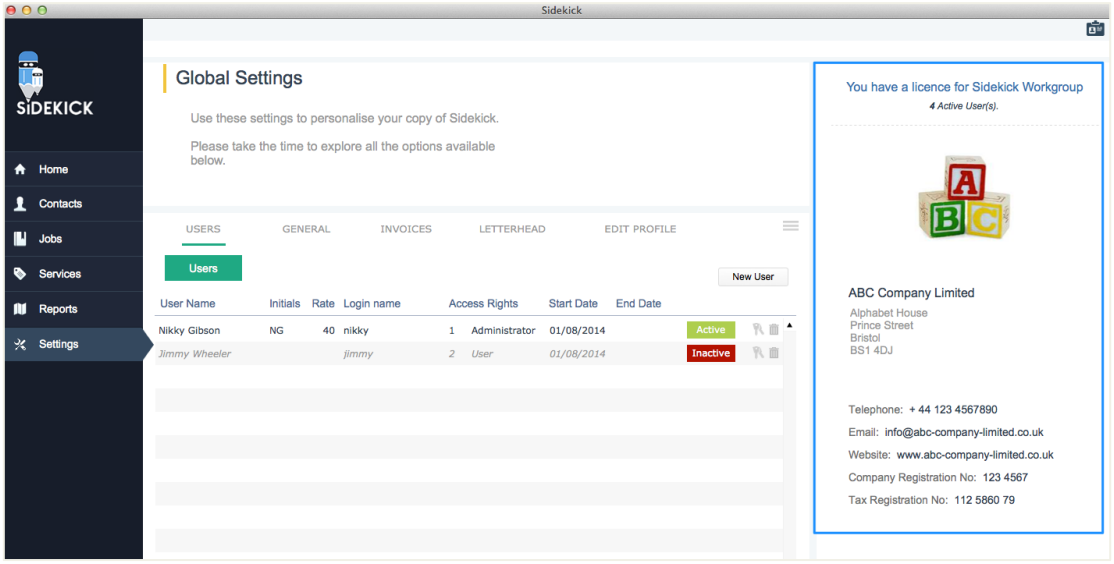

Figure 67 - Global settings screen

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